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After Close Date Processes

Other

DISCLAIMERS

E-mail notifications – Some e-mail accounts, especially free public accounts (i.e. Hotmail, yahoo, etc., this may also be the case with AOL) the link to a particular document in Spirit may not function properly. If this is the case with your e-mail, it will be necessary for you to "copy" the link in the e-mail message and paste it in a separate window. Doing this allows the link to operate properly. If you do not have this issue with your e-mail notifications all you will need to do to reach the document in Spirit is click on the link. The link will route you to the Spirit log in screen. Once you log in, Spirit will send you directly to the document in question; so there will be no searching for anything.

Browser Cache settings – Your browser cache settings must be set to check for newer versions of stored pages every visit to the page.

For **Internet Explorer**:

Click on the "Tools" menu and select "Internet Options," then click on the "Settings" button to arrive at this screen. Make sure "Every visit to the page" (highlighted) is checked.
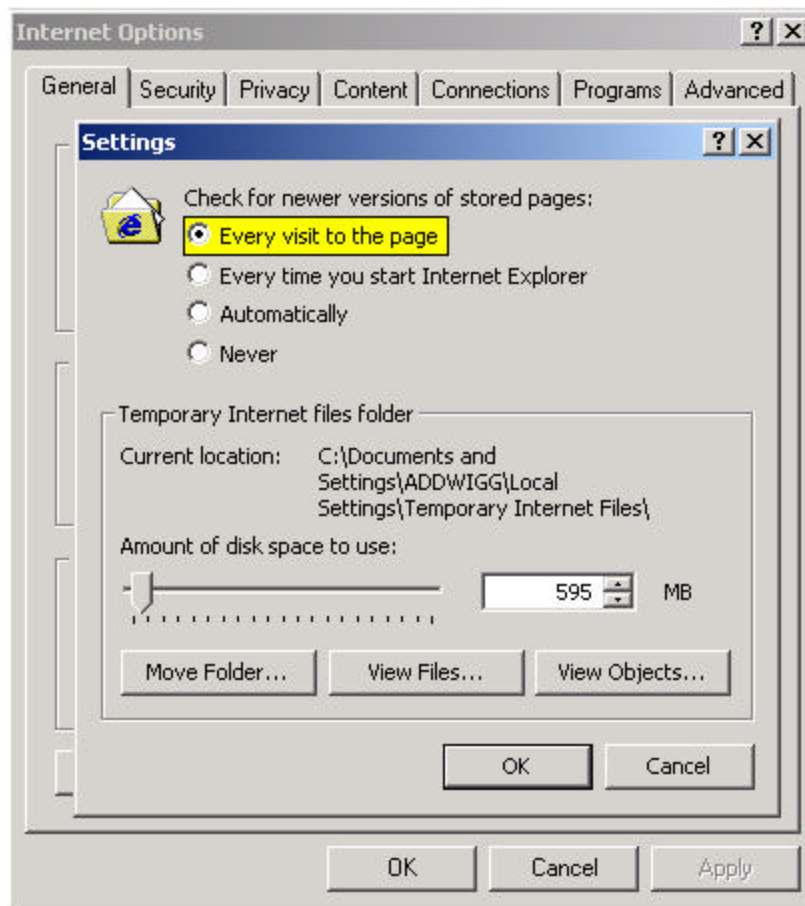
User ID – When you register in the Spirit System it sets the e-mail address you enter as your User ID when you log in.

Pop-up blockers – with advertisements popping up with so many of the websites people visit these days, some are employing "pop-up blockers" to deny the pop-ups. If you use a "pop-up blocker" it will be necessary to inactivate it when you are using Spirit. The Spirit System generates pop-up windows throughout its various processes. Pop-up blockers may affect your experience in the Spirit application.

Best viewed – with monitor settings at 1024x768 pixels

Attachments – if possible, please refrain from including graphic heavy files as attachments or excessively large files. If you can keep the files simple the time necessary to add attachments will be reduced.

Some examples: A 1.33 mb file takes roughly 30 to 40 seconds to successfully attach to proposal documents. A 6.23 mb file takes roughly 2 minutes and 45 seconds
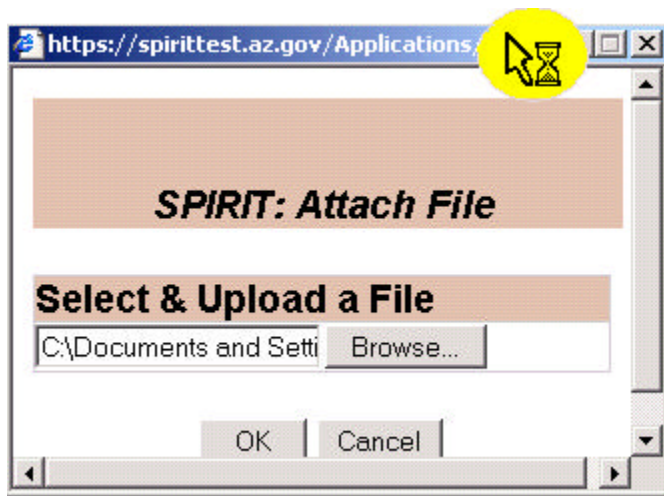
Note image above. The file to be attached appears in the file field and the OK button to attach the document has been clicked on. Float your mouse pointer in the area that the image indicates after you have clicked on the OK button. The hour glass will appear next to your pointer so you will know it is processing. If you don't do this, you may wonder if anything is happening at all.

Solicitation Response
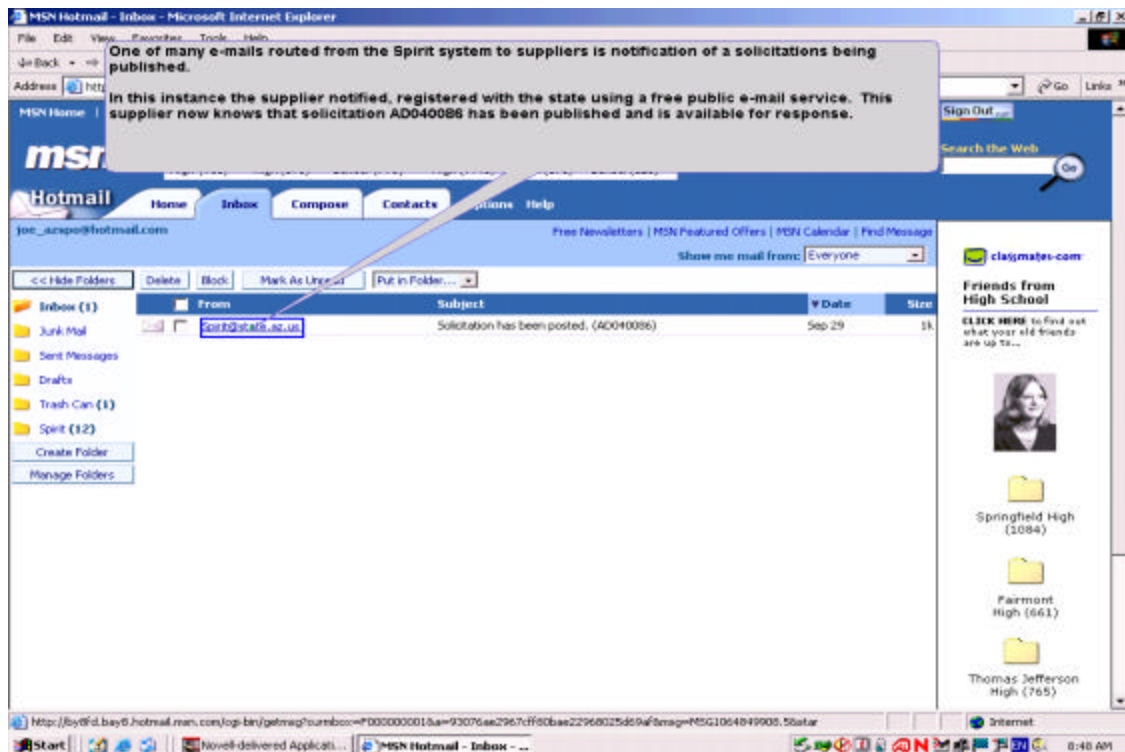
E-mail Notification

Throughout the procurement process, Spirit issues e-mail notifications indicating a response in the next step is ready for your attention.

The first of such e-mail notifications is notification of a "Published Solicitation," which is what is covered in this section of this manual.

In any of the demos for response to a solicitation; the demo supplier used is "Joe Azspo Test." This demo supplier was set up with a "Hotmail" account to demonstrate how the notifications will work.

A disclaimer that must be made with regard to e-mail notifications is that with some e-mail accounts, especially free public accounts (i.e. Hotmail, yahoo, etc. This may be the case with AOL as well) the link to a particular document in Spirit may not function properly. If this is the case with your e-mail, it will be necessary for you to "copy" the link in the e-mail message and paste it in a separate window. Doing this allows the link to operate properly. If you do not have this issue with your e-mail notifications all you will need to do to reach the document in Spirit is click on the link. The link will route you to the Spirit log in screen. Once you log in, Spirit will send you directly to the document in question; so there will be no searching for anything.

E-mail notifications however, are not the only means to getting to a document of interest. Anything you can reach through the use of notification e-mail links can be accessed manually using the navigation menu in Spirit. This will be covered in greater detail in a demo created specifically for navigation.

One of many e-mails routed from the Spirit system to suppliers is notification of a solicitations being published.

In this instance the supplier notified, registered with the state using a free public e-mail service. This supplier now knows that solicitation AD040086 has been published and is available for response.
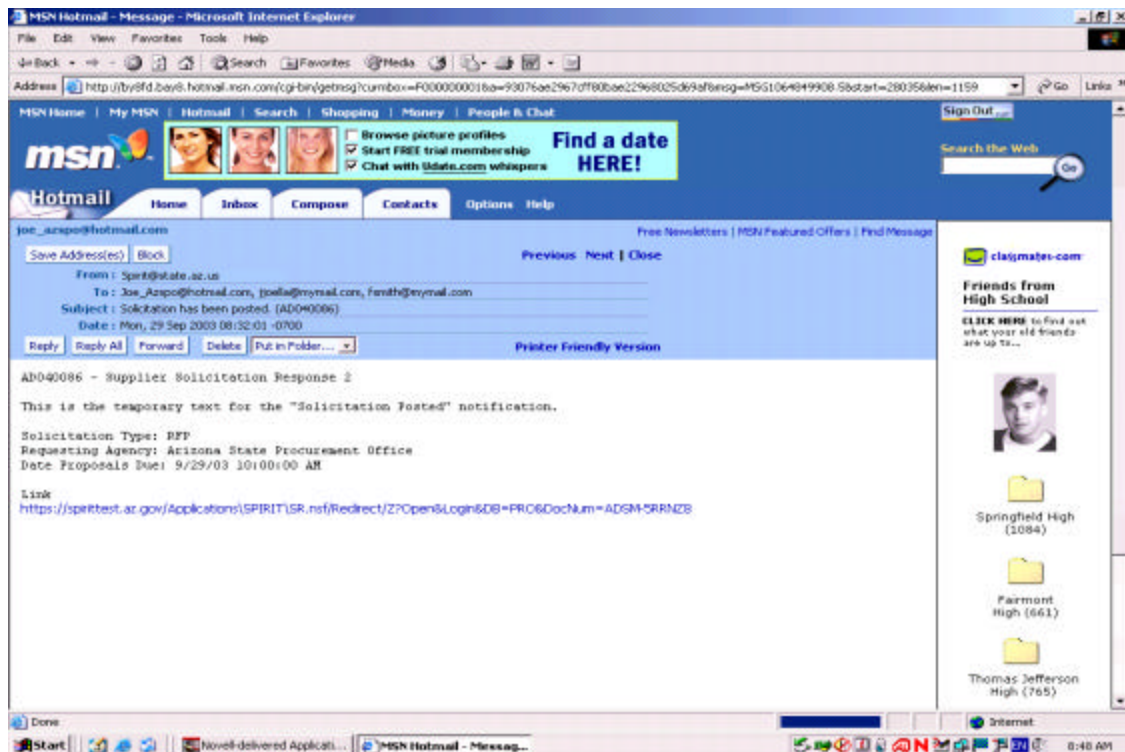
The supplier is given basic details regarding the solicitation, including: Solicitation Number, Solicitation Title, Type of Solicitation, requesting Agency and the date the proposals to the solicitation are due.

Also available is a link directly to the solicitation.

In some instances (especially with free public e-mail services), the link to the procurement does not function properly. If this is the case for the supplier, the link can be copied and pasted into a separate internet browser window.
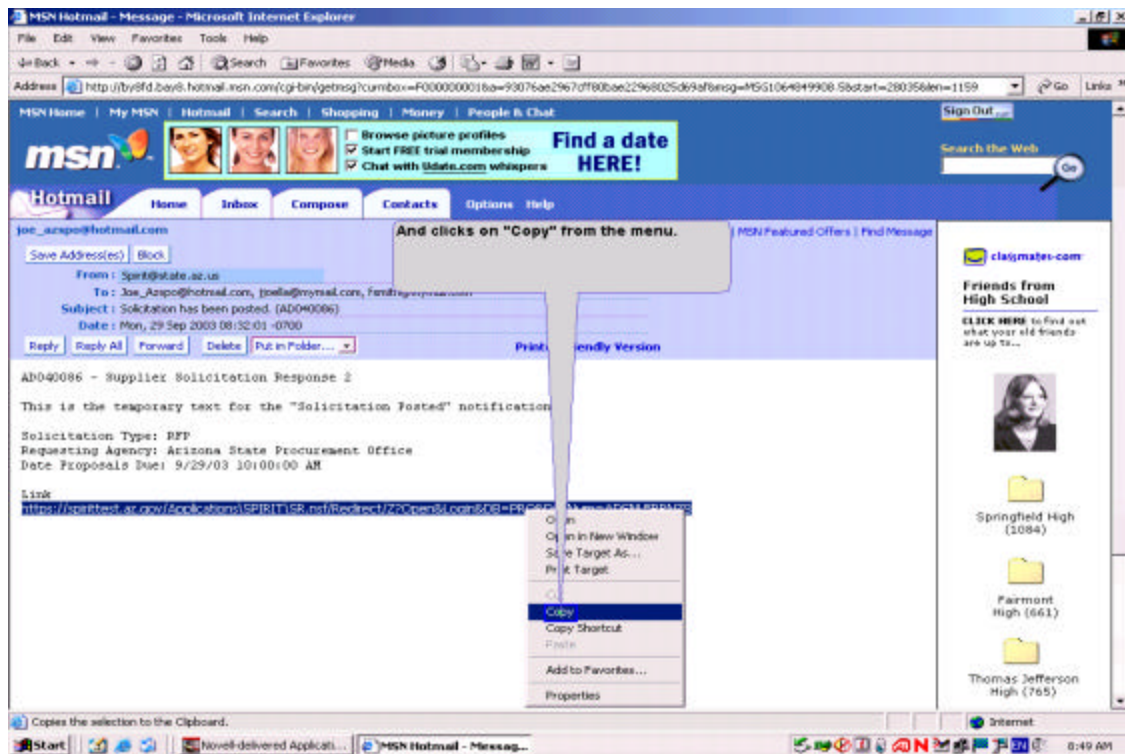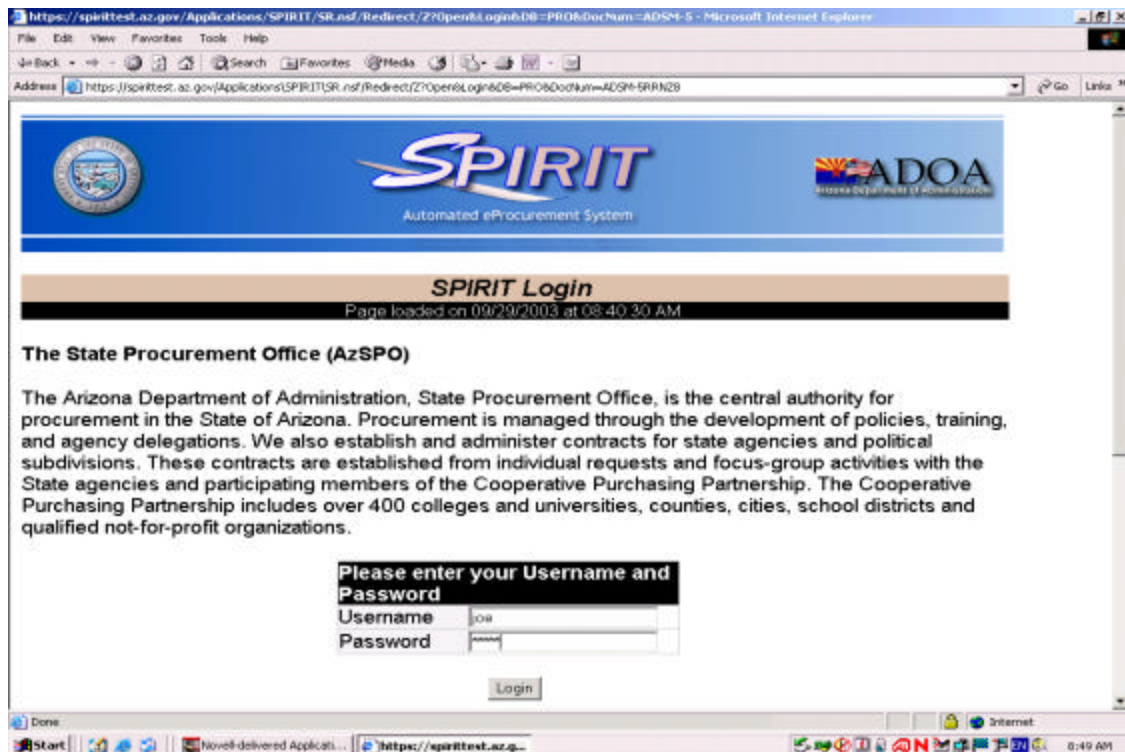
The supplier in the demo highlights the link with his mouse.

Right clicks on the mouse.

And clicks on Copy from the menu.

The supplier then "pastes" the link into the browser address field.

The supplier is redirected to the Spirit login screen. Had the supplier had to copy and paste the link, clicking on the link would have brought him here as well.

To respond to the solicitation, you must log into Spirit using your User ID (e-mail you registered with) and password.

Then click on the Login **button.**

Solicitations by Section

As mentioned previously, once logged in, the supplier is routed directly to the solicitation.

Accessing a solicitation is also possible by using the menu tabs to the left.

The Title, Solicitation Number, and status of the solicitation is in the header of the document.

At anytime, a user can click on the "Help Icon" if needed.

The "Submit Proposal" link is clicked on to create a "Draft" proposal to a solicitation.

Document Information

Supplier Solicitation Response 2
Solicitation #AD040086
Published
Page loaded on 09/29/2003 at 08:40:40 AM.

Document Information   **?**

Submit Proposal **?**

Requisition #:	-----	Solicitation #:	AD040086	Contract #:	TBD
Amendment:	No			Amend. #:	0
Created By:	Pete Mahnke/Arizona State Procurement Office			Date Created:	09/29/2003
Requestor:	Pete Mahnke/Arizona State Procurement Office			Gov't Entity:	Arizona State Procurement Office
Process Status:	Unknown			Status:	Published
Date Published:	09/29/2003	Close Date:	09/29/2003	Type:	RFP

Other data identified in the "Document Information" section of a solicitation is:

Requisition #: requisition sent by an agency or created by a PO to initiate the procurement process. The requisition is not accessible until after award of a contract.

Solicitation #: Number assigned to this procurement. It will also be the contract number when awarded. The contracted suppliers number will begin with AD040086 and will be followed by a suffix, for example -1. If multiple suppliers are awarded, they will each have consecutive numbers which are assigned alphabetically.

Contract #: TBD, to be decided.

The second row contains:

Amendment: No - this indicates that no amendments have been issued.

Supplier Solicitation Response 2
Solicitation #AD040086
Published
Page loaded on 09/29/2003 at 08:40:40 AM.

Document Information				?
		Submit Proposal ?		
Requisition #:	-----	Solicitation #:	AD040086	Contract #: TBD
Amendment:	No		Amend. #:	0
Created By:	Pete Mahnke/Arizona State Procurement Office		Date Created:	09/29/2003
Requestor:	Pete Mahnke/Arizona State Procurement Office		Gov't Entity:	Arizona State Procurement Office
Process Status:	Unknown		Status:	Published
Date Published:	09/29/2003	Close Date:	09/29/2003	Type: RFP

Amend. #: - 0 indicates the amendment number, if any.

Close Date: date at which proposals to the solicitation are due. Any proposals to an RFP or IFB not submitted as complete prior to 3 PM MST on the close date will be rejected. The RFQ deadline time is 5 PM MST on the close date indicated.

Type: reflects the type of procurement method being used. In this instance it is an RFP, which as mentioned above will be due at 3 PM MST on the close date indicated.

Supplier Solicitation Response 2
Solicitation #AD040086
Published
Page loaded on 09/29/2003 at 08:40:40 AM.

Document Information   ?

Submit Proposal ?

Requisition #:	-----	Solicitation #:	AD040086	Contract #:	TBD
Amendment:	No		Amend. #:	0	
Created By:	Pete Mahnke/Arizona State Procurement Office	Date Created:	09/29/2003		
Requestor:	Pete Mahnke/Arizona State Procurement Office	Gov't Entity:	Arizona State Procurement Office		
Process Status:	Unknown	Status:	Published		
Date Published:	09/29/2003	Close Date:	09/29/2003	Type:	RFP

The third row:

Created By: indicates the PO who wrote and is likely assigned to the solicitation. Note that his name is a link. Clicking on the link routes the user to his contact information.

Date Created: date the soliciation draft was begun.

Fourth row:

Requestor: (this is also a link), indicates the individual and their agency affiliation that created and sent the requisition. In this instance the PO at the Arizona State Procurement Office wrote the requisition. It is most likely that this is a solicitation that will become a Statewide contract.

Supplier Solicitation Response 2
Solicitation #AD040086
Published
Page loaded on 09/29/2003 at 08:40:40 AM.

Document Information ?

Submit Proposal ?

Requisition #:	-----	Solicitation #:	AD040086	Contract #:	TBD
Amendment:	No		Amend. #:	0	
Created By:	Pete Mahnke/Arizona State Procurement Office		Date Created:	09/29/2003	
Requestor:	Pete Mahnke/Arizona State Procurement Office		Gov't Entity:	Arizona State Procurement Office	
Process Status:	Unknown		Status:	Published	
Date Published:	09/29/2003	Close Date:	09/29/2003	Type:	RFP

Gov't Entity: indicates the agency affiliation of the individual sending the amendment.

Fifth row:

Process Status: indicates at what stage in the procurement process the solicitation is presently at.

Status: indicates the status of the solicitation.

This last row in the "Document Information" section includes:

Date Published: date the solicitation was issued.

Solicitation Information

Solicitation Information			
PO Assigned:	Pete Mahnke/Arizona State Procurement Office		
PM Assigned:	Rex Martin/Arizona State Procurement Office	PA Assigned:	Jean Clark/Arizona State Procurement Office
Priority Solicitation:	No	Review by Date:	10/01/2003
Contract Type:	Statewide	Date To Close:	09/29/2003 3:00 PM
Include Questionnaire?		Yes	
Solicitation Title:	Supplier Solicitation Response 2		
Conference Location:	Conference Room A, 100 N. 15th Ave, Ste 104, Phoenix, AZ 85007	Conference Date:	09/29/2003 10:00 AM
Description:			
Supplier Solicitation Response - the steps necessary within the Spirit System for the proper response to a solicitation by a business registered as a supplier with the Arizona State Procurement Office.			

Further down the document is the "Solicitation Information" section. The first two rows of which, contain the PO, PM and PA assigned to the solicitation.

The information in this third row are more of an internal nature. A PM has the option of setting a solicitation as "Priority" if he or she wishes a final view of the draft solicitation before it is published. Review by Date: is a date selected for evaluators or others involved to have any proposals submitted reviewed by.

This row indicates what type of contract this solicitation will become. Either for Statewide or Agency specific use. It also contains the close date and time.

This row indicates whether or not a "Questionnaire" form is included in the solicitation for the proposing suppliers to complete.

Finally, the Solicitation Title is listed and the Pre-proposal or Pre-bid Conference date, time and location.

Description: is a brief summary of the needs or wants of the solicitation. The wording used in the description also allows a user to search with these parameters for a solicitation or contract.

Clauses, Price Sheet and Attachments

The "Clauses" section contains the Special Instructions to Offerors, Special Terms and Conditions, Uniform Instructions and Uniform Terms and Conditions. Each of these sections is a link. By clicking on one a window is opened containing each of its clauses, which are also in turn links; allowing for the viewing of the clause language.

The Price Sheet, Scope/Specification and Questionnaire buttons open those documents. A user may use any of the buttons or links described in this demo prior to clicking on the "Submit Proposal" link if they desire.

Beneath the buttons described above is the "Attachments" section. This area allows a PO to include any necessary documentation within a solicitation.

NOTE: when a solicitation is published within Spirit a .pdf copy of the solicitation is generated. Users may click on the link and save the document for printing/reference. It is also necessary to do the same with the Scope of Work or Specification. These documents are not included in the .pdf of the solicitation when published.

Submit Proposal

To begin a "Draft" of a proposal to a solicitation click on the Submit Proposal link. If once begun, you find that the solicitation is not something your company is interested in responding to, you may either cancel or not submit the proposal as "Complete." If the proposal is not submitted as "Complete" it will be deleted after the close date and time.

Proposals by Section

The "Draft" of your to the solicitation is generated.

The header contains the solicitation number, your Proposal number and its Status.

Proposal Information

Basic information regarding the Proposal is include in the "Proposal Information" section.

Your Proposal Number and its status. Is BAFO? indicates "No" at this point. If and when a "Best and Final Offer" is requested, this field will have "Yes" as the indicator. The BAFO # indicates the number of the BAFO, i.e. 1, 2, 3...

Created By: lists the User logged in that initiated the proposal. Supplier Name: is the company submitting the proposal. The name listed in both these areas are links that can be clicked, which leads to contact information.

Date Created: is the date the proposal was initiated. Date Due: is the close date of the solicitation, after which no proposals will be accepted.

Once entered "Total Price:" will indicate the total price for all Line Items offered or bid on.

And Date Submitted: will be indicated when the proposal is submitted as "Complete."

General Information

Information regarding the Solicitation is listed in the General Information section.

Title, Solicitation Number (solicitation number is a link that routes back to the solicitation itself), and the Solicitation Type.

The Procurement Officer assigned and his or her office affiliation.

Location, date and time of the Pre-bid/Pre-proposal Conference (if scheduled).

Again the "Description" of the solicitation is included.

Clauses (Instructions & Terms and Conditions)

Clauses
Special Instructions
Special Terms and Conditions
Uniform Instructions
Uniform Terms and Conditions

The "Clauses" section contains links to the Special Instructions to Offerors, Special Terms and Conditions, Uniform Instructions and Uniform Terms and Conditions.

Click on the Special Instructions **link to open a window containing the clauses included.**

Each clause can be clicked on to open the language included in that particular clause.

Click on Evaluation

The "clause" and its language is opened.

Click on the [Back] button to return to the list of Special Instruction section. You may also click on the "Close" button to return to the proposal.

You may then view other clauses or click on the [Close] button to return to the proposal.

The same procedures can be followed to view the other documents and their clauses. To view the Special Terms and Conditions click on the link.

To Do List

To Do List			
Initially Required Items			
Item			Status
● 1. Offer	Create	----------	Pending
● 2. Price Sheet	----------	View	Pending
● 3. Questionnaire	----------	View	Pending
● 4. Insurance	----------	View	N/A
● 5. Bid Bond	----------	View	N/A
● 6. Performance Bond	----------	View	N/A
Potentially Required In the Future			
1. Clarification Response	----------	----------	Not Yet Required
2. Negotiations	----------	----------	Not Yet Required
3. BAFO	----------	----------	Not Yet Required

The "To Do List" is the area within your proposal where most of the response will be addressed.

1. Offer: Click on "Create" to fill in the Offer and Acceptance form. Acknowledgement of this form obligates the supplier to go into contract with the State of Arizona, if awarded a contract.

2. Price Sheet: Contains the Line Items which describe the services or goods being solicited. The user clicks on the "View" link to complete the Price Sheet.

3. Questionnaire: Click on the "View" link to open that document and answer the questions as posed by the solicitation.

4. Insurance: Is a savable and printable document that must be completed outside the system and submitted to the Arizona State Procurement Office before any service or goods can be sold off a contract, if awarded.

5. Bid Bond: Is a savable and printable document that must be completed outside the system and submitted to the Arizona State Procurement Office, prior to the close date and time of the solicitation. It will then be scanned by the state and attached to your proposal.

To Do List			
Initially Required Items			
Item			Status
● 1. Offer	Create	----------	Pending
● 2. Price Sheet	----------	View	Pending
● 3. Questionnaire	----------	View	Pending
● 4. Insurance	----------	View	N/A
● 5. Bid Bond	----------	View	N/A
● 6. Performance Bond	----------	View	N/A
Potentially Required In the Future			
1. Clarification Response	----------	----------	Not Yet Required
2. Negotiations	----------	----------	Not Yet Required
3. BAFO	----------	----------	Not Yet Required

6. Performance Bond: Is a savable and printable document that must be completed outside the system and must be submitted to the Procurement Office if awarded a contract and prior to any work being done or goods sold based upon the contract.

Within the "To Do List" is an area entitled "Potentially Required in the Future." It is not required to do anything with these three steps unless instructed to do so after the close date and time.

1. Clarification Response: If necessary, during the evaluation, you may receive e-mail notification that a "Clarification Response" is requested. This may due to something that is not clear to the evaluation committee reviewing your proposal. To respond, you will need to either click on the link included in the e-mail notification and be redirected to the "Clarification Request" or you can use the navigation menu on the left. A "View" link will be available should you manually navigate to this section.

2. Negotiations: If negotiations are deemed necessary by the PO; as with the Clarification Response, you will receive notification of negotiations being initiated. Either use the link included in the notification or click on the "View" link available in this section.

3. BAFO: If your proposal is found to be reasonably susceptible of award and the PO deems it necessary a Best and Final Offer may be requested. Again, you will be notified via e-mail that step in the procurement process has been initiated. Follow the link within the e-mail or navigate manually to this section and click on the "View" link to respond.

Confidential Information

Contract Payment Terms are entered in this field and Contract Delivery as specified in the Special Terms and Conditions is entered in this field.

Any information included in your proposal that you consider of a confidential nature must be cut and pasted into this window. Reference should be made as to its original location within the document(s) the language was taken from. Information included in the "Confidential Information" section will be viewable only to those within the State of Arizona that are authorized.

Attachments

The "Attachment" section allows a supplier submitting a proposal to attach any documents they feel necessary to complete their proposal.

NOTE: due to the size of some files it may take a brief period of time to attach any given document. If not necessary, do not include unneeded images or graphics in attached documents. If the file is large, it could take a few minutes to attach effectively.

The file names of any documents you attach will appear here as links. Clicking on the file name link will open the document.

You may also remove any attached documents by clicking on the "Remove" button.

More on the addition and removal of attachments later.

Save as: Draft or Complete

The Spirit system default for most documents created in the application is "Draft." To save any work to date, be sure the "Draft" radio button is selected and click on the "Submit" button.

When you are satisfied that your proposal to a solicitation is complete, select the "Complete" radio button and click on the ⬛Submit⬛ button. If necessary, you are able to cancel a proposal. If that is done and you intend to submit, you will need to begin all over again.

Cancel/Withdraw Proposal

For whatever the reason, a supplier may decide that they do not wish to complete or continue with a proposal. A supplier may also have "submitted" their proposal as "Complete" and would like to make a change to it. The supplier has a number of choices at their disposal.

Save as: ○ Draft ○ Complete ◉ Cancel

Submit   Reset

They may select "Cancel" at the "Save as" status area and click on the
Submit **button**

OR

Supplier Proposal for Solicitation AD040088
Proposal #ADSM-5S4LCH
Draft
Page loaded on 10/07/2003 at 09:17:54 AM.

Proposal Information
Cancel

At the top of a proposal, note that there is a "Cancel" button. This button is only available when the proposal is in "View" mode, prior to clicking on the "edit" icon. It is also available after you have submitted your proposal as "Complete."

Reinstate a Proposal

Once you have selected "Cancel" whether by clicking on the [Cancel] button or by selecting the "Cancel" status and submitting; a [Reinstate] button will then be available at the top of your "Cancelled" proposal. You may then click on the [Reinstate] button to make your "Cancelled" proposal active again.

NOTE: The Cancel and Reinstate functionality is not available after a solicitation has Closed.

Whether submitted as "Draft" or "Complete" you will be routed to the "My Proposals By Solicitation Number" section of the Spirit application.

Note that the status of your proposal (on top) is "Draft." To continue with your proposal click on the proposal number link.

After a proposal has been submitted as "Draft" or "Complete" you are returned to the "My Proposals By Solicitation Number.

Had you saved the proposal as "Draft," logged out and returned at a later time to continue your draft of the proposal; you would click on the Proposals tab, then clicked on the "My Proposals" tab from the sub menu to bring this page up to continue.

Click on your proposal number link <u>ADSM-5RULE6</u> .

Note: were you to click on the solicitation number link, you would be able to click on the "View My Proposal" link at the top of the solicitation.

Your proposal; like most documents you will work with in Spirit, opens in view mode.

Click on the "Edit" icon (pencil) to change it to edit mode.

Now that the "Edit" icon is gone, you may continue with your proposal.

In drafting your proposal to a solicitation, you do not have to complete required forms in a particular order. You may consider it best to complete the "Offer" form last.

For the sake of this manual, we will proceed in the order each document/section appears in the proposal.

1. Offer

To Do List			
Initially Required Items			
Item			Status
● 1. Offer	Create	----------	Pending
● 2. Price Sheet	----------	View	Pending
● 3. Questionnaire	----------	View	Pending
● 4. Insurance	----------	View	N/A
● 5. Bid Bond	----------	View	N/A
● 6. Performance Bond	----------	View	N/A
Potentially Required In the Future			
1. Clarification Response	----------	----------	Not Yet Required
2. Negotiations	----------	----------	Not Yet Required
3. BAFO	----------	----------	Not Yet Required

To complete the Offer and Acceptance form (Offer), click on the Create **link**

Offer
Solicitation # AD040086
Supplier: Joe Azspo Test
Page loaded on 09/29/2003 at 08:45:20 AM.

= Required Field

Offer	?
TO THE STATE OF ARIZONA: The Undersigned hereby offers and agrees to furnish the material, service or construction in compliance with all terms, conditions, specifications and amendments in the Solicitation and any written exceptions in the offer. Signature also certifies Small Business status.	

Tax Information	
Arizona Transaction (Sales) Privilege Tax License No.	N/A
Federal Employer Identification No.	563794213

Location Information	
Company Name	Joe Azspo Test
Address:	1211 W Monkey St Suite 100 St Phraxas, AZ 85555-1236

Clarification Information							
Name:							
Phone:				Fax:			

Electronic Signature			
Name:	Joe Azspo	Date:	09/29/2003 08:45 AM
• Title:			

The "Offer" opens.
Note that this is just the top portion of the form.

Enter the name of the individual that will be the main contact for this proposal and any clarifications.

Enter the phone and fax number.

Enter your title.

● **Certification**

Status: Pending

By Accepting below, the bidder certifies:

1. The submission of the offer did not involve collusion or other anti-competitive practices.
2. The bidder shall not discriminate against any employee or applicant for employment in violation of Federal Executive Order 11246, State Executive Order 75.5 or A.R.S. §§ 41-1461 through 1465.
3. The bidder has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant in connection with the submitted offer. Failure to provide a valid signature affirming the stipulations required by this clause shall result in rejection of the offer. Signing the offer with a false statement shall void the offer, any resulting contract and may be subject to legal remedies provided by law.
4. The bidder certifies that the above referenced organization ○ is ○ is not a small business with less than 100 employees or has gross revenues of $4 million or less.

[Accept] [Reject]

The bottom half of the Offer and Acceptance Form contains a statement of certification.

You will need to read this certification prior to submitting the "Offer" form.

4. select the radio button indicating whether your company is a small business or not.

Once completed, click on the [Accept] button.

You are again back at the proposal "To Do List." Note that the "Status" of the "Offer" is now "Complete.

2. Price Sheet

To fill in the Price Sheet, click on the "View" link

Proposal Price Sheet
Solicitation # AD040086

Price Sheet   **?**

Please record pricing for products as requested on the Solicitation Price Sheet. If necessary, include an attachment with your proposal regarding the detail note requested for Line Item number one (1).

Solicitation Type:	RFP		Tabulation Grouping:	By Line Items					

LI #	Cm Code # Cm Code Item #	Commodity Code Description Commodity Code Item Description	Manufacturer	Pricing	Qty	%	Unit Price	Ext Price
1	0070-0018 0070-0018-0005	Motor Scooters and Trucksters, Engine Driven (Including all Terrain Vehicles) Medium Capacity		FP	25			$ .00
2	0070-0020 0070-0020-0002	Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles) All Terrain		FP	25			$ .00
							Total: $ .00	

Close   Reload

The Price Sheet with instructions opens.

Though there are no lines; the screen is broken into columns:

LI #: Line Item Number
Cm Code#: Commodity Code Number
Cm Code Item # Commodity Code Item Number
Manufacturer: If requested you must enter the manufacturer of good offered. Once you enter it, it will appear in this column.
Pricing: click on the link to view the pricing definitions: FP=fixed price, DLP=discount off list price, PLP=percentage of list price
Qty: Quantity
%: if a percentage off or of were requested, your entry would appear in this column
Unit Price: price you enter per each unit.
Ext Price: system calculates extended price and fills in the blank

Proposal Price Sheet
Solicitation # AD040086

Price Sheet

Please record pricing for products as requested on the Solicitation Price Sheet. If necessary, include an attachment with your proposal regarding the detail note requested for Line Item number one (1).

Solicitation Type:	RFP		Tabulation Grouping:		By Line Items				

LI #	Cm Code # Cm Code Item #	Commodity Code Description Commodity Code Item Description	Manufacturer	Pricing	Qty	%	Unit Price	Ext Price
1	0070-0018 0070-0018-0005	Motor Scooters and Trucksters, Engine Driven (Including all Terrain Vehicles) Medium Capacity		FP	25			$ .00
2	0070-0020 0070-0020-0002	Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles) All Terrain		FP	25			$ .00
							Total: $ .00	

[Close] [Reload]

The commodity code number is the high level code(s) you entered when your company registered in the Spirit system.

0070 is Motor Scooters and Trucksters
0018 is Engine Driven

0005 is Medium Capacity. This is selected by the PO based upon the goods/services requested in the requisition.

Proposal Price Sheet
Solicitation # AD040086

Price Sheet

Please record pricing for products as requested on the Solicitation Price Sheet. If necessary, include an attachment with your proposal regarding the detail note requested for Line Item number one (1).

Solicitation Type:	RFP			Tabulation Grouping:		By Line Items				

LI #	Cm Code # Cm Code Item #	Commodity Code Description Commodity Code Item Description	Manufacturer	Pricing	Qty	%	Unit Price	Ext Price
1	0070-0018 0070-0018-0005	Motor Scooters and Trucksters, Engine Driven (Including all Terrain Vehicles) Medium Capacity		FP	25			$ .00
2	0070-0020 0070-0020-0002	Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles) All Terrain		FP	25			$ .00
							Total: $ .00	

Close   Reload

To fill out information to complete the Price Sheet click on the Line Item number link 1 (highlighted in yellow).

Proposal Line Item
Proposal # ADSM-5RULE6
Line Item # 1
Page loaded on 09/29/2003 at 08:47:01 AM.

● = Required Field

Line Item # 1   **?**

0070-0018	Motor Scooters and Trucksters, Engine Driven (Including all Terrain Vehicles)
0070-0018-0005	Medium Capacity

Grp	Pricing	Qty	UOM	%	● Unit Price	Ext Price
-----	FP	25	Each	N/A		$ .00

Other

● Manufacturer:

● Model:

● Catalog #:

Catalog URL:

● Catalog Date:

● Part #:

● Please provide a break down of the pricing of additional parts included with each scooter.

[Create Alternate]

Save as: ⦿ Draft ○ Complete

[Submit] [Cancel] [Reset]

The Proposal Line Item window opens allowing for the entry of the required information.

Enter a Unit Price for the goods or service offered.

Enter a manufacturer

Model name of product offered.

Catalog number or name the item can be found in.

If you have a website where this product is available you can enter its URL here. If awarded a contract this link will be located with your contract in Spirit so that contract users will be able to follow the link to the product.

Enter the Catalog date

And a part number

This area above, may be included if the PO deems it necessary. The notes may differ from solicitation to solicitation.

Please note that the previous fields requesting various information may vary from solicitation to solicitation.

The "Create Alternate" button will be discussed shortly.

As with the forms in the Spirit system, the "Save as:" status defaults to "Draft."

If you are satisfied with your work, you can change the status to "Complete" and click on the "Submit" button.
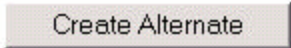
If you do submit as complete, you will still be able to edit your work.

Spirit requires that all forms be Saved as: Complete before you are able to submit your proposal as "Complete."

This Line Item allowed for an "Alternate" to be proposed in addition to that required by the solicitation. An alternate may not be an exact match to the Specifications, however, the supplier may feel that this could meet the need. There is no guarantee that the "Alternate" will be accepted, but it will be considered.

Click on the Line Item number link 1 to return and create an "Alternate" offer.

Creating an Alternate Line Item

Once in the Line Item, to create an "Alternate," scroll to the bottom of the window and click on the ⟨Create Alternate⟩ **button.**

Spirit creates a duplicate of the information you entered for Line Item number 1.

The supplier may then replace that information with the correct or appropriate detail.

Note that this is Line Item # 1a

This supplier may be offering an "Alternate" that is equal to the main product offered. It is a different "Model" and the price is likely lower.

Once the appropriate information is edited, the supplier changes the "Save as:" status to "Complete" and clicks on the ⟨Submit⟩ **button.**

This solicitation Price Sheet included two line items, so the supplier clicks on the Line Item Number 2 link to fill out that information.

Note: If the Solicitation Price Sheet is set up to be evaluated by line item, and the contract can be awarded by line item a supplier does not have to make an offer on all line items. You must, however, enter zero in the line item area as well as "NO OFFER OR NO BID" in each of the required fields in a particular line item.

Price Sheet								?
Please record pricing for products as requested on the Solicitation Price Sheet. If necessary, include an attachment with your proposal regarding the detail note requested Line Item number one (1).								
Solicitation Type:	RFP			**Tabulation Grouping:**		By Line Items		
LI #	**Cm Code # Cm Code Item #**	**Commodity Code Description Commodity Code Item Description**	**Manufacturer**	**Pricing**	**Qty**	**%**	**Unit Price**	**Ext Price**
1	0070-0018 0070-0018-0005	Motor Scooters and Trucksters, Engine Driven (Including all Terrain Vehicles) Medium Capacity	Newstam	FP	25		$ 1,000.00	$ 25,000.00
1a	0070-0018 0070-0018-0005	Motor Scooters and Trucksters, Engine Driven (Including all Terrain Vehicles) Medium Capacity	Newstam	FP	25		$ 890.00	$ 22,250.00
2	0070-0020 0070-0020-0002	Motor Scooters and Trucksters, Electric Powered (Including Golf Carts and All Terrain Vehicles) All Terrain	Newstam	FP	25		$ 1,250.00	$ 31,250.00
							Total: $ 56,250.00	

Close   Reload

Once a line item is filled in and submitted, regardless of whether or not as "Draft" or "Complete," the supplier is returned to the "Price Sheet."

Note that Spirit has calculated the Extended Price for the three offerings and the "Total Price."

The Price Sheet is complete.

The supplier clicks on the Close **button. The user may also click on the price sheet windows X**

Note that the "Price Sheet" status is "Complete."

Had the supplier left any of the Line Items in "Draft" status, the status of the Price Sheet would still have reflected "Pending

3. Questionnaire

To answer the Questionnaire, click on the View **link.**

The PO will have included instructions for properly filling the form out.

If you choose to, you may copy and paste the answers in the appropriate field from a separate document. This document will have to have been saved as a "Plain Text" document. Some formatting in word processing software may not translate properly. Or you may type the answer in directly.

Each question is accompanied by a Red Dot (required field), you must answer each question in its answer field.

As with all other documents sections in a solicitation in the Spirit system that require completion, you will have to change the "Save as:" status to "Complete" prior to submitting the proposal as "Complete."

As noted previously, you do not have to do so at this juncture. Spirit will not allow you to submit your proposal if a section(s) is incomplete.

Click on the [Submit] **button, to return to the proposal.**

Note again that if you do save the questionnaire as "complete" you will still be able to edit your answers.

Note that the status is now "Complete."

Remember; even though you have submitted the Questionnaire as "Complete," you may still edit the answers.

Insurance, Bid and Performance Bond

To Do List			
Initially Required Items			
Item			Status
• 1. Offer	Create	----------	Pending
• 2. Price Sheet	----------	View	Pending
• 3. Questionnaire	----------	View	Pending
• 4. Insurance	----------	View	N/A
• 5. Bid Bond	----------	View	N/A
• 6. Performance Bond	----------	View	N/A

The next steps covered entail completing the Insurance Certificate, Bid Bond and Performance Bond.

Each of these documents will open appropriately for printing or saving. In all instances it will be necessary for you to complete them outside the Spirit system to be submitted via mail or hand delivery.

The Insurance Certificate and Performance Bond are usually not necessary unless awarded a contract, however, you will need to refer to the Special Instructions or Special Terms for specific direction in each solicitation.

To view and perhaps print the Certificate of Insurance, click on its View **link.**

Certificate of Insurance

Click on the windows "Maximize" **button if you wish. Print the certificate so that it may be filled out.**

Note that the Solicitation Number and the Supplier is included in the certificate.

All required monetary amounts are included in the form as well, in accordance with the Special Terms and Conditions.

To close the certificate and return to your proposal, click on the windows X.

Bid Bond

To Do List			
Initially Required Items			
Item			Status
● 1. Offer	Create	----------	Pending
● 2. Price Sheet	----------	View	Pending
● 3. Questionnaire	----------	View	Pending
● 4. Insurance	----------	View	N/A
● 5. Bid Bond	----------	View	N/A
● 6. Performance Bond	----------	View	N/A

The Bid Bond is handled in the same manner as the Certificate of Insurance.

Click on the View link to view and print the bond.

SPIRIT
Automated eProcurement System
ADOA Arizona Department of Administration

Bid Bond
Solicitation # AD040086
Supplier: Joe Azspo Test

KNOW ALL PERSONS BY THESE PRESENTS:

THAT, **Joe Azspo** (hereinafter called Principal), as Prinipal, and **Joe Azspo Test**, a corporation organized and existing under the laws of the State of **AZ** with its principal office in the city of **St Phraxas** (hereinafter called the Surety), as Surety, are held and firmly bound unto the State of Arizona, (hereinafter called Obligee) in the amount of _____ (Dollars) ($ _____), for the payment whereof, the said Principal and Surety bind themselves and their heirs, administrators, executors, successor assigns, jointly and severally firmly by these presents.

WHEREAS, the principal has submitted a bid for:
_____

Supplier Solicitation Response 2
Supplier Solicitation Response - the steps necessary within the Spirit System for the proper response to a solicitation by a business registered as a supplier with the Arizona State Procurement Office.

Again, you may maximize ▣ the document. As with the Certificate of Insurance; the solicitation number and supplier name is on the form. Various supplier references are also incorporated into the document (bold type). As well as the solicitation title (bold type).

Click on the windows X to close the document.

Performance Bond

To Do List			
Initially Required Items			
Item			Status
● 1. Offer	Create	----------	Pending
● 2. Price Sheet	----------	View	Pending
● 3. Questionnaire	----------	View	Pending
● 4. Insurance	----------	View	N/A
● 5. Bid Bond	----------	View	N/A
● 6. Performance Bond	----------	View	N/A

Click on the View **link for the Performance Bond.**

Performance Bond
Solicitation # AD040086
Supplier: Joe Azspo Test

KNOW ALL PERSONS BY THESE PRESENTS:

THAT, **Joe Azspo** (hereinafter called Principal), as Prinicipal, and **Joe Azspo Test**, a corporation organized and existing under the laws of the State of **AZ** with its principal office in the city of **St Phraxas** (hereinafter called the Surety), as Surety, are held and firmly bound unto the State of Arizona, (hereinafter called Obligee) in the amount of _____ (Dollars) ($ _____), for the payment whereof, the said Principal and Surety bind themselves and their heirs, administrators, executors, successor assigns, jointly and severally firmly by these presents.

WHEREAS, the Principal has entered into a certain written contract with the Obligee, dated the _____ day of _____ 20___, for the material, service or construction described as:
_____

Supplier Solicitation Response 2
Supplier Solicitation Response - the steps necessary within the Spirit System for the proper

Maximize the document or print it.

This form also incorporates information about the supplier and solicitation as the Bid Bond did.

Click on the windows X to return to the proposal. This covers documents included with the solicitation that require responses outside the Spirit system.

Payment Terms and Delivery

Payment Terms must be entered by the supplier here.

Contract Delivery must be entered in this field. Be sure it conforms with the requirements of the solicitation.

Confidential Information

As state earlier, any information included in your proposal that you consider of a confidential nature must be cut and pasted into this window. Reference should be made as to its original location within the document(s) the language was taken from. Information included in the "Confidential Information" section will be viewable only by those within the State of Arizona that are authorized.
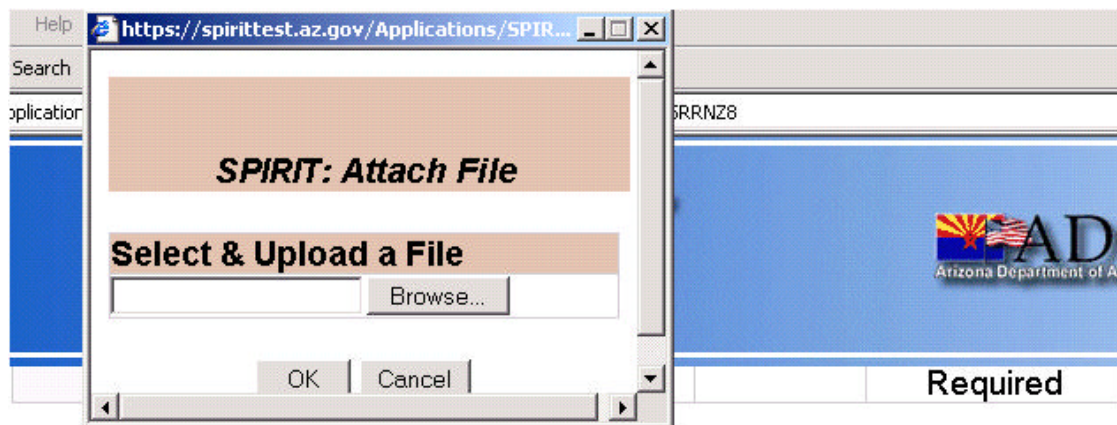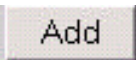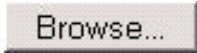
Attachments

You may have files that are relevant to the solicitation and your proposal to it.

Attaching documents is much like the process used to make attachments to e-mails.

Click on the ⬚Add⬚ **button.**

The *Spirit: Attach File* window will open. Click on the ⬚Browse...⬚ **button to locate the file(s) on your hard drive or disk. The Attachment functionality is very much like attaching a file(s) to an e-mail.**
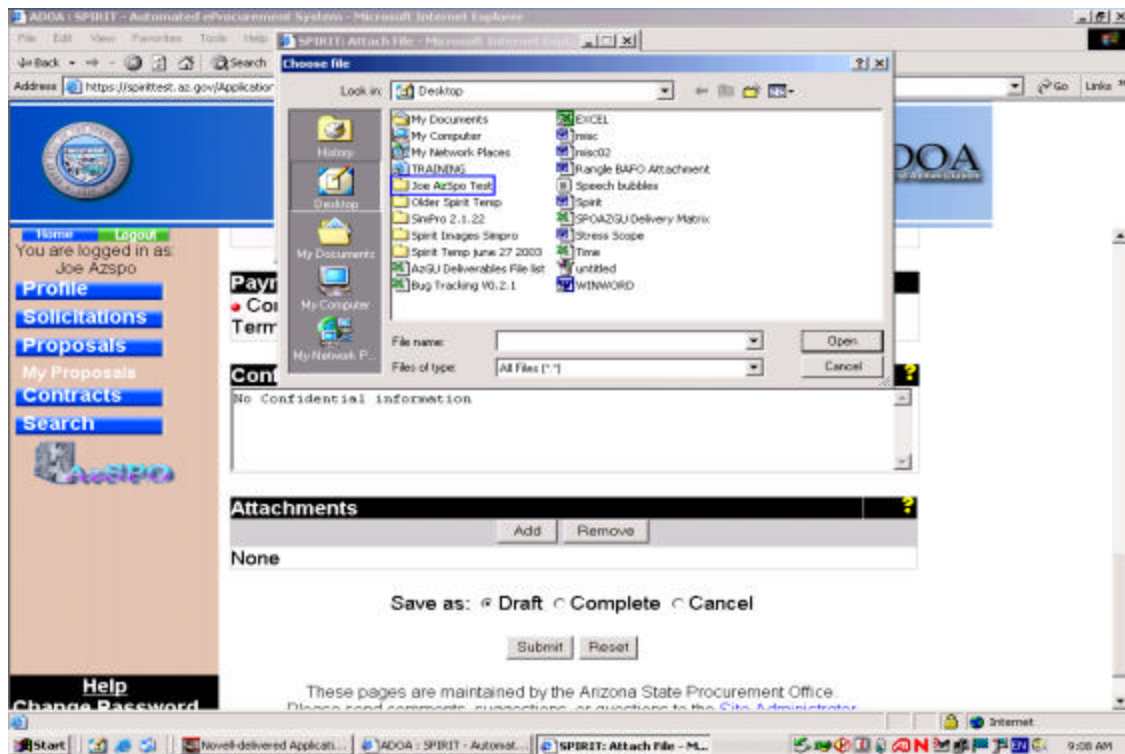
The supplier in this document clicks on [icon] Joe AzSpo Test **folder to open it, then double clicks on the file (**[icon] Stammer I **) you wish to attach or click on the Open button.**
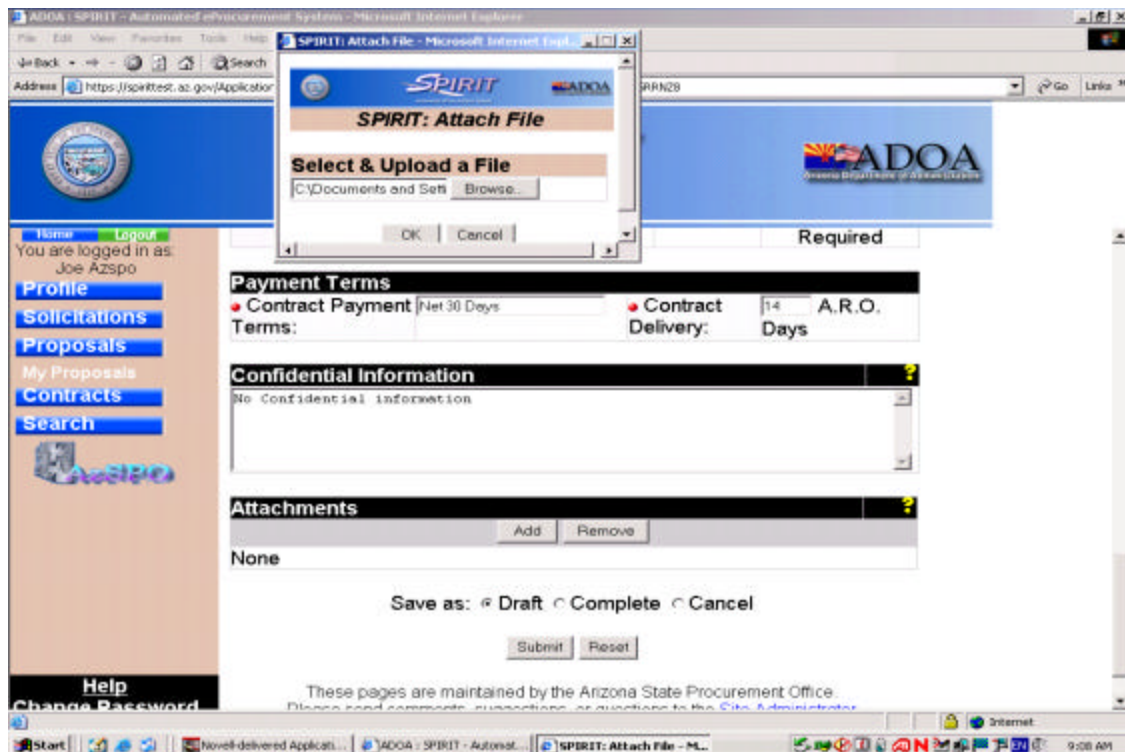
Then clicks on the [OK] button to attach the file. Continue this process until all the files you wish to attach are included in the "Attachments" section of the proposal.

Confidential Information   **?**

No Confidential information

Attachments   **?**

[Add] [Remove]

Stammer I.doc
Stammer II.doc
JAzspo History.doc
JAzspo Catalog.doc

Save as: ⦿ Draft ○ Complete ○ Cancel

[Submit] [Reset]

In addition to the ▣ Stammer I **file, the supplier also attaches** ▣ Stammer II **,** ▣ JAzspo History **, and the** ▣ JAzspo Catalog **file. They now all appear in the "Attachment section of the proposal. Click on any of the file name links to open and view the documents.**

Removing Attachments
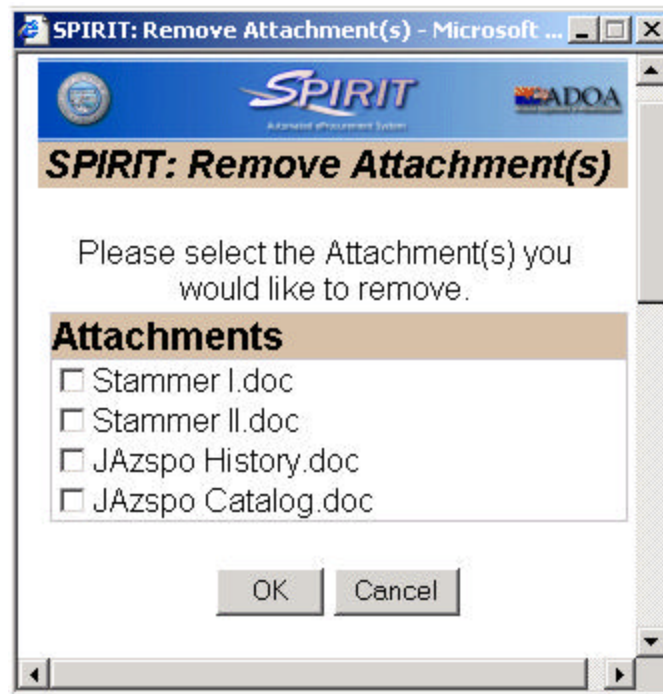
To remove any attached files, click on the Remove **button. The window above will open listing the files attached. Place a checkmark in the box(es) to the left of the file(s) you wish to remove. Then click on the** OK **button.**

Submitting as Complete

Confidential Information ❓

No Confidential information

Attachments ❓

| Add | Remove |

Stammer I.doc
Stammer II.doc
JAzspo History.doc
JAzspo Catalog.doc

Save as: ○ Draft ⊙ Complete ○ Cancel

| Submit | Reset |

When your proposal to the solicitation is complete, change the "Save as:" status to "Complete" and click on the [Submit] button. If you intend to return and do more work on the draft, leave the status as "Draft" and click on the [Submit] button.

NOTE: if you have forgotten to set the status of the Price Sheet or Questionnaire as "Complete," Spirit will not allow you to "Submit" your proposal as "Complete." It will however, tell you what has not been done.

Your proposal to the solicitation has been submitted as complete

Close Date Change

Throughout the procurement process, Spirit issues e-mail notifications indicating a response in the next step is ready for your attention.

The first of such e-mail notifications is notification of a "Published Solicitation," which is what started this series of demos.

In any of the demos for response to a solicitation; the demo supplier used is "Joe Azspo Test." This demo supplier was set up with a "Hotmail" account to demonstrate how the notifications will work.

A disclaimer that must be made with regard to e-mail notifications is that with some e-mail accounts, especially free public accounts (i.e. Hotmail, yahoo, etc. This may be the case with AOL as well) the link to a particular document in Spirit may not function properly. If this is the case with your e-mail, it will be necessary for you to "copy" the link in the e-mail message and paste it in a separate window. Doing this allows the link to operate properly. If you do not have this issue with your e-mail notifications all you will need to do to reach the document in Spirit is click on the link. The link will route you to the Spirit log in screen. Once you log in, Spirit will send you directly to the document in question; so there will be no searching for anything.

E-mail notifications however, are not the only means to getting to a document of interest. Anything you can reach through the use of notification e-mail links can be accessed manually using the navigation menu in Spirit. This will be covered in greater detail in a demo created specifically for navigation.

The subject of this notification is the "Solicitation Close Date Change." Amendments to a solicitation will no longer be issued if the only change to a solicitation is the "Close Date." You will receive an e-mail notification and link directly to the solicitation so that you can see the new date.
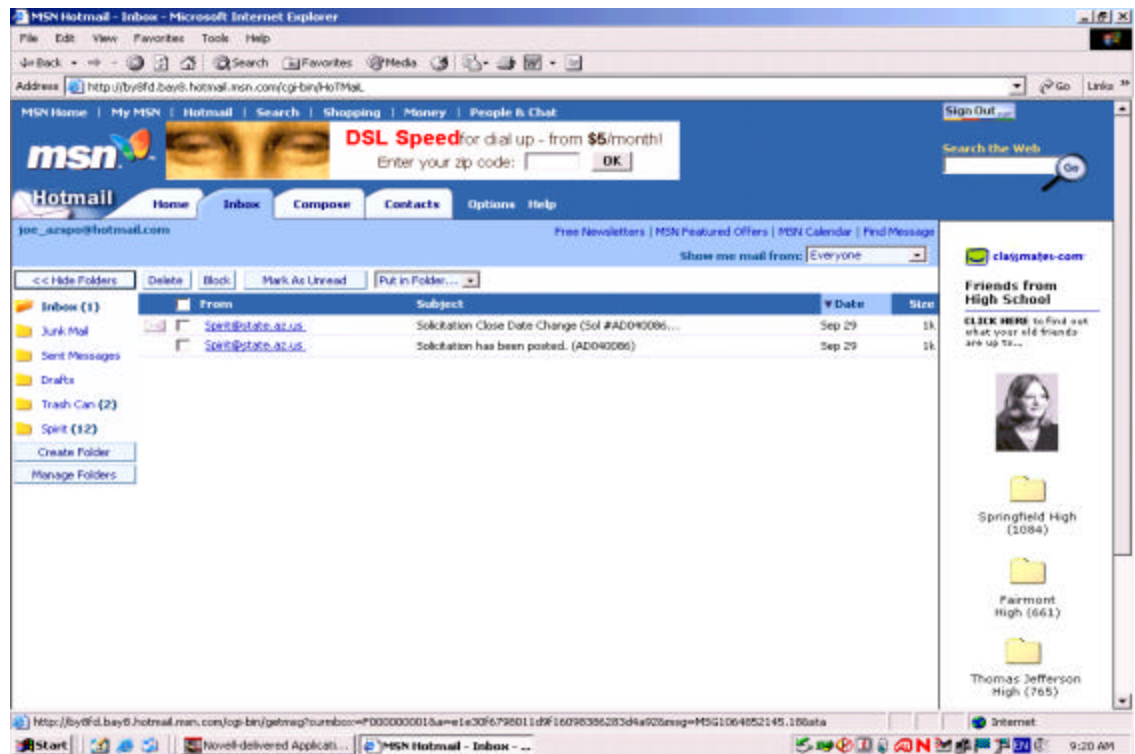
The supplier has received a notification e-mail indicating that the Solicitation Close Date has been changed.

In Hotmail, the supplier clicks on the "senders" e-mail address to open and read the message.
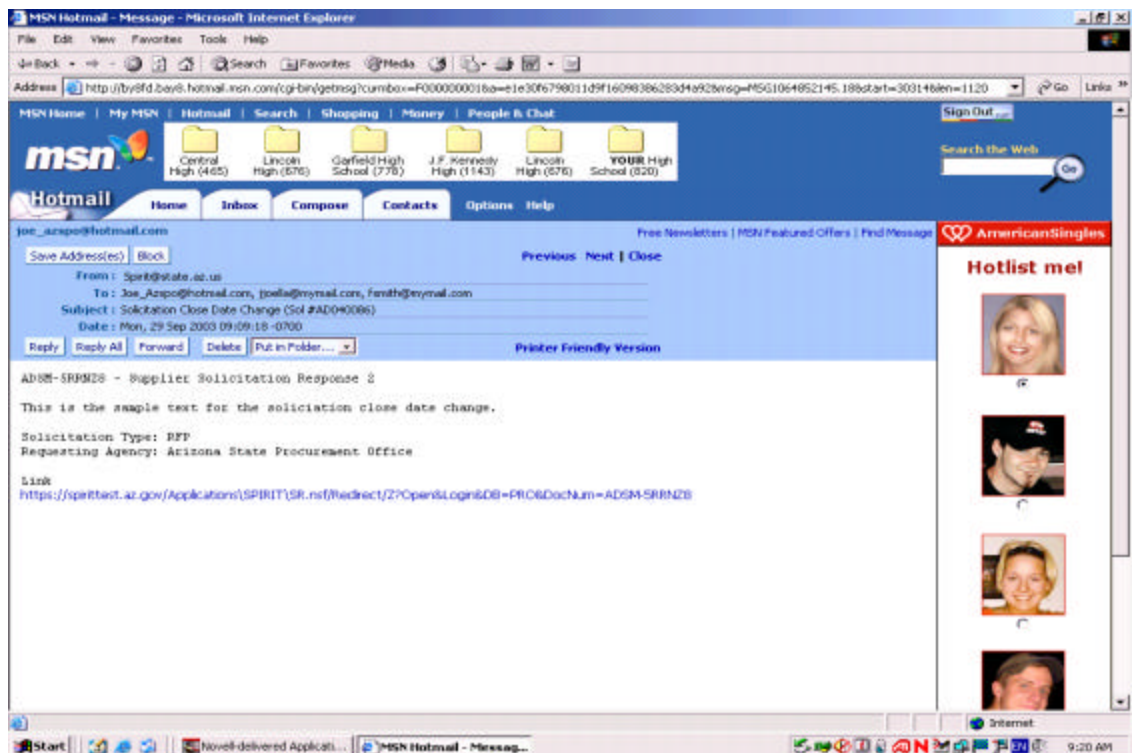
The notification is sent to the registered users in this particular company from the Spirit system.

The subject line references the solicitation and the reason for the e-mail.

The solicitation title and "temporary sample" text is included in the body of the e-mail.

As mentioned earlier, it may be necessary a supplier to copy and paste the link within the e-mail into a separate browser window.
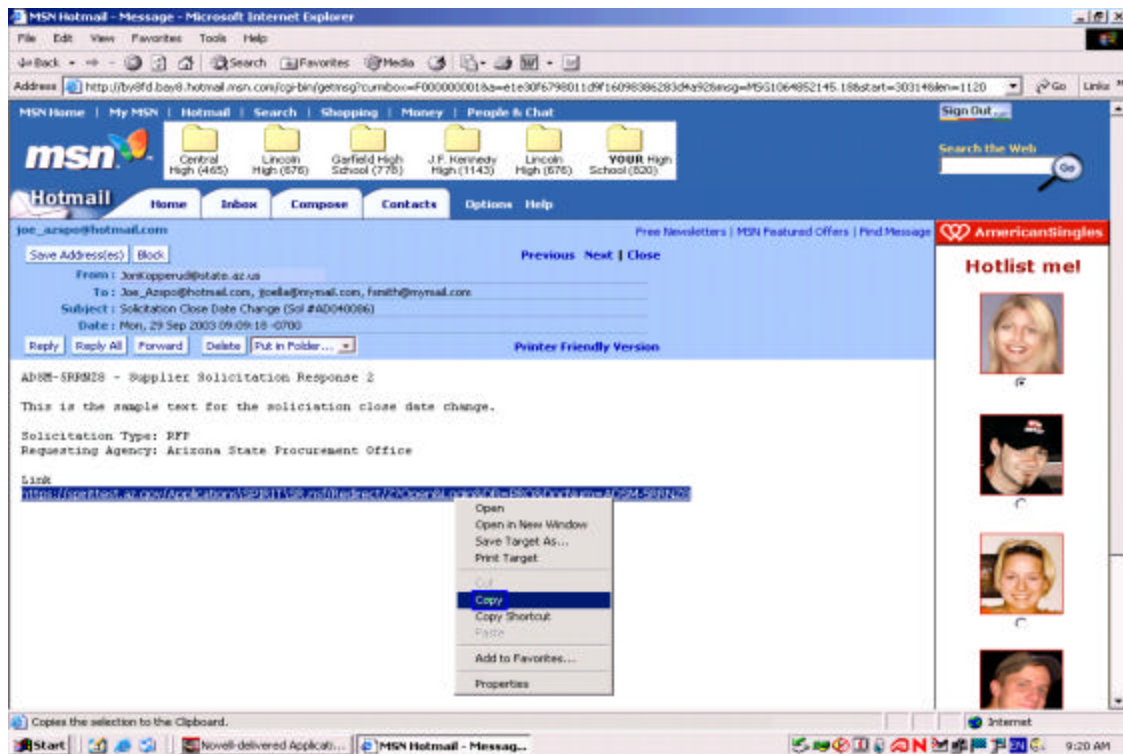
The supplier highlights the link, then right clicks on the right button on the mouse and Clicks on Copy **. In the case with Hotmail, the supplier clicks on** Sign Out.net **then pastes the copied link into the browsers address field and hits enter.**

The Spirit Login screen opens. It is necessary to enter your User ID (your e-mail address) and your Password. Click on the Login **button**

Supplier Solicitation Response 2
Solicitation #AD040086
Published
Page loaded on 09/29/2003 at 09:11:36 AM.

Document Information					?
View My Proposal					
Requisition #:	-----	Solicitation #:	AD040086	Contract #:	TBD
Amendment:	No			Amend. #:	0
Created By:	Pete Mahnke/Arizona State Procurement Office		Date Created:	09/29/2003	
Requestor:	Pete Mahnke/Arizona State Procurement Office		Gov't Entity:	Arizona State Procurement Office	
Process Status:	Unknown		Status:	Published	
Date Published:	09/29/2003	Close Date:	10/01/2003	Type:	RFP

Note the new Close Date
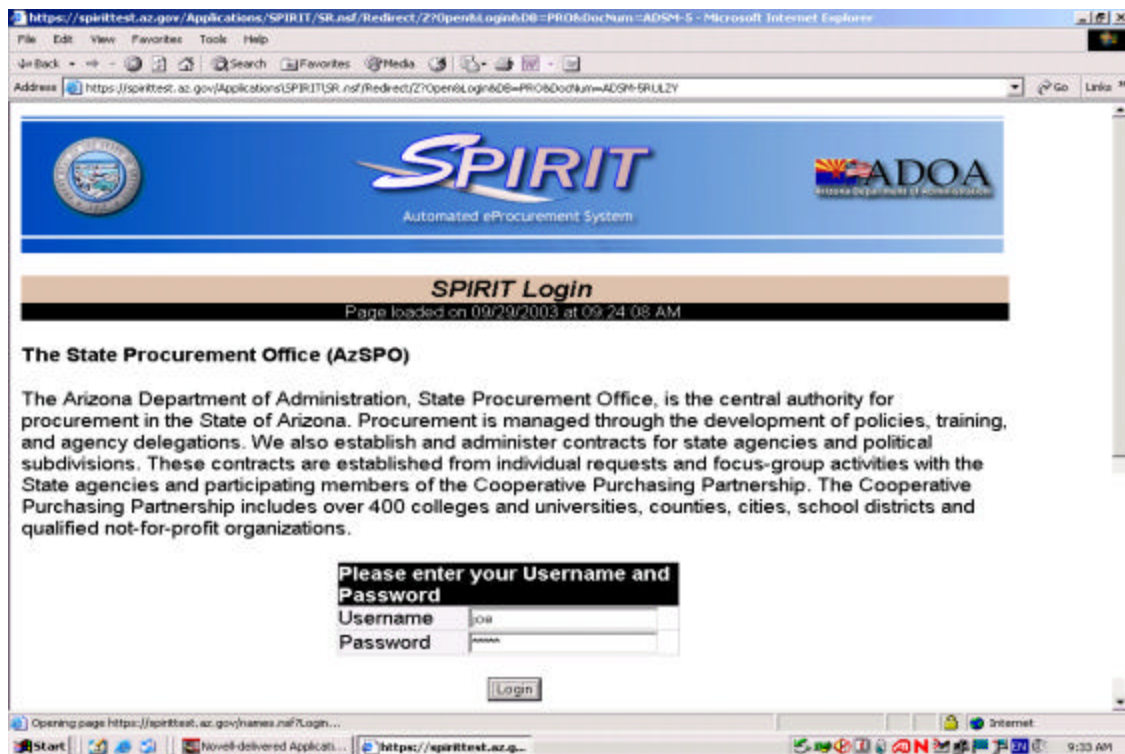
Solicitation Amendment
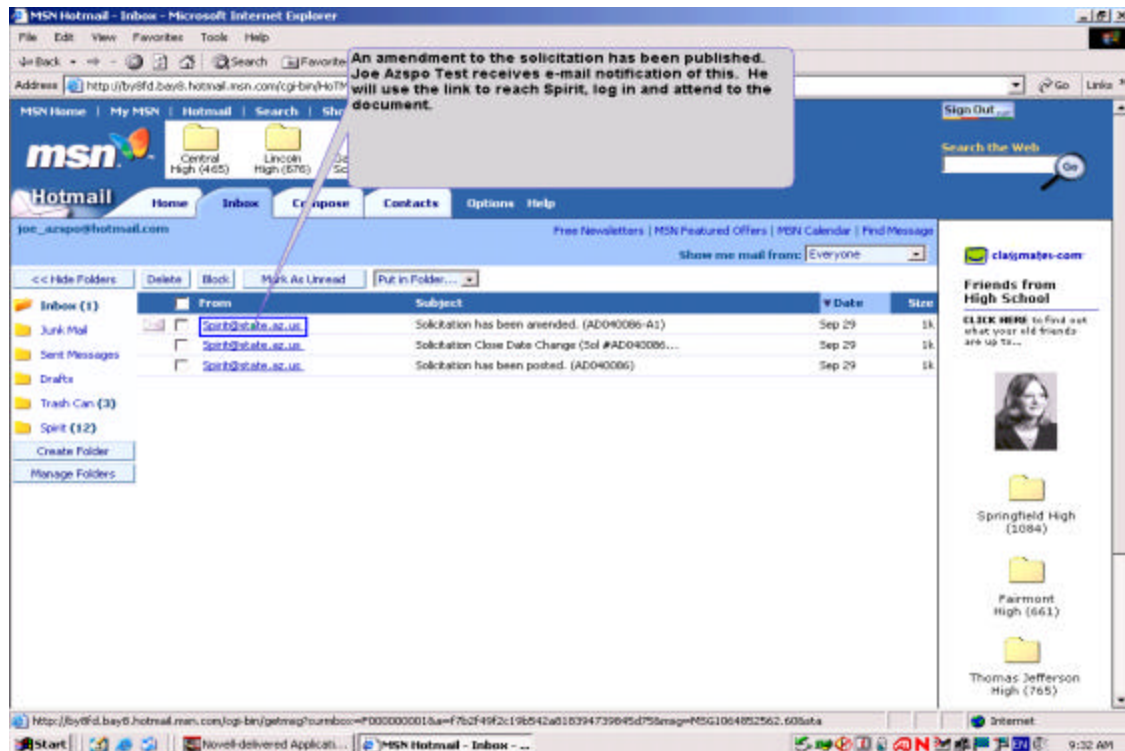
An amendment to the solicitation has been published. Joe Azspo Test receives e-mail notification Spirit@state.az.us **of this. He will use the link to reach Spirit, log in and attend to the document.**
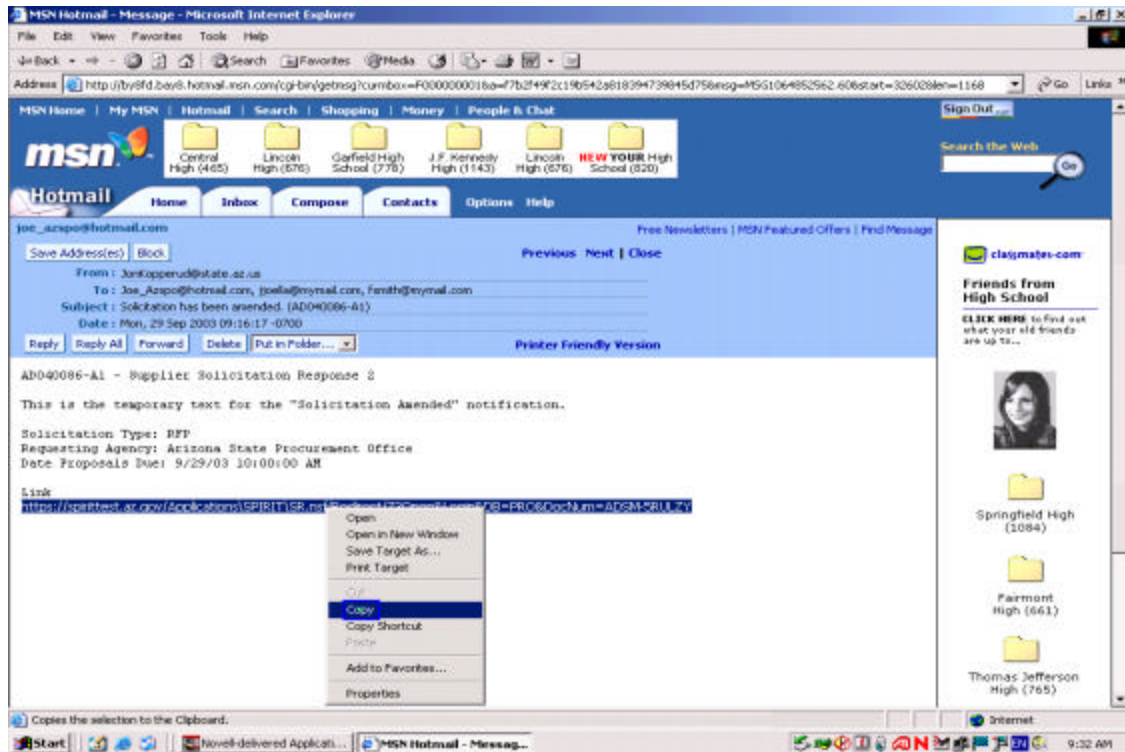
He copies ( )the link to paste into the browser window. Clicks on from Hotmail in this instance.

Types in his log in information (e-mail address and password).

Amendments in Spirit function differently than Azpix, which most people are familiar with.

When an amendment is created an exact duplicate of the original solicitation is generated, thereby allowing the PO to make the necessary changes. So all information from the original solicitation is encompassed in the new document. When finally published, the amendment replaces the solicitation.

Now AD040086-A1 is the active solicitation.

When Spirit duplicated the solicitation for the amendment it also generates a copy of your proposal, which you may be in the process of drafting. This is a functionality we strived to include so that the supplier community would not be forced to begin from square one any time an amendment was issued.

Solicitation Amendment Disclaimer: Two areas however, that will be of concern; are the questionnaire and price sheet. If no changes have been made to the solicitations questionnaire or price sheet in the amendment the supplier will not have to redo any work in those sections that they may have already done.

However, if changes to the solicitation have been made in either/both those sections, the supplier will have to readdress those sections and recomplete them, if they have already been completed.

Note the solicitation number now has a suffix of A1. This indicates Amendment 1. The second row now reflects an Amendment: Yes and Amend. #: 1.

The Amendment Information section is roughly midway down the screen. The PO will indicate why it was necessary to amendment the original solicitation and what may have been changed.

In this instance, the Close Date has been changed back to the original 9/29 and the Performance Bond requirement has been removed.

Below that is the area that indicates whether the Price Sheet or Questionnaire has been altered. In this case, neither has been changed. The supplier will not have to readdress either of the forms, unless they had not been completed prior to the publication of the amendment. Spirit duplicated all the suppliers input.

The supplier clicks on the View My Proposal **link to continue work.**

Click on the "edit" **icon, to open the proposal in edit mode.**

Note: even if the Offer and Acceptance form has been completed in the original proposal, it is necessary to complete one for the amendment. This is the case with all amendments and the Best and Final Offer.

Note: Spirit has duplicated the "Payment Terms," "Contract Delivery," and "Confidential Information."

All attached files are present as well.

Spirit has duplicated the "Payment Terms," "Contract Delivery," and "Confidential Information."

Click on the Create **link to fill out and complete the Offer and Acceptance form to the amended solicitation.**

As with the Offer form in your original proposal, fill out the contact information and indicate whether your company is a small business or not, then click on the Accept button.

Click on the any of the View **links if you need to address anything in those forms.**

All the data entered by the supplier was duplicated by the Spirit system for the amendment.

Any section that you entered information has been refilled out for you, with the exception being if no changes were made by the PO to the Price Sheet or Questionnaire.

Remember that you can edit these documents now even if you submitted the proposal as "Complete" prior to the amendment being issued.

To give an example; if you had clicked on the **link for the Price Sheet the "Save as:" status now only has "Complete" as the option. The supplier is able to make any changes that may be necessary, however, if the price sheet and it's line items were complete prior to the amendment being created and published, it would not be necessary to return to each line item again and** **them as "Complete."**

If you clicked on the View link for the Questionnaire you would see that the Questionnaire is also in edit mode, but in a "Complete" status.

As there were not major changes to the solicitation through the amendment, the supplier changes the status to "Complete" and clicks on the ⬚**Submit** **button.**

You are returned to the "My Proposals By Solicitation Number" screen.

Tabulation after close

If you have responded to solicitations in the past, you are probably aware that the "Opening" of solicitations is a public forum. With Spirit, you no longer have to physically go to the Arizona State Procurement Office. Any supplier that submitted a proposal can return to the solicitation and their proposal to it after the Close Date/Time and view a list of the suppliers that submitted proposals. If you responded to an Invitation For Bid, the prices offered would also be listed.
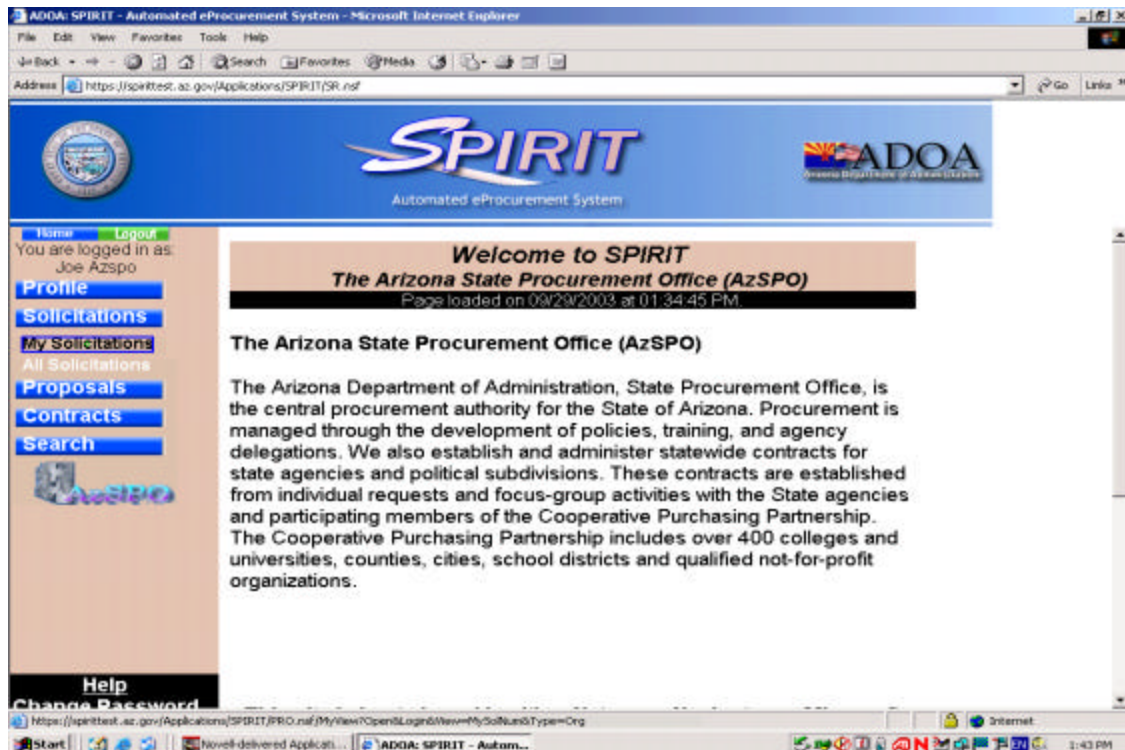
To view the Tabulation of a solicitation; after logging in, click on the Solicitations **tab. From its sub-menu click on the** My Solicitations **tab.**

At the "My Solicitations By Solicitation Number" screen, click on the solicitation number. The procurement we have been using for the manual AD040086-A1 will be clicked on.
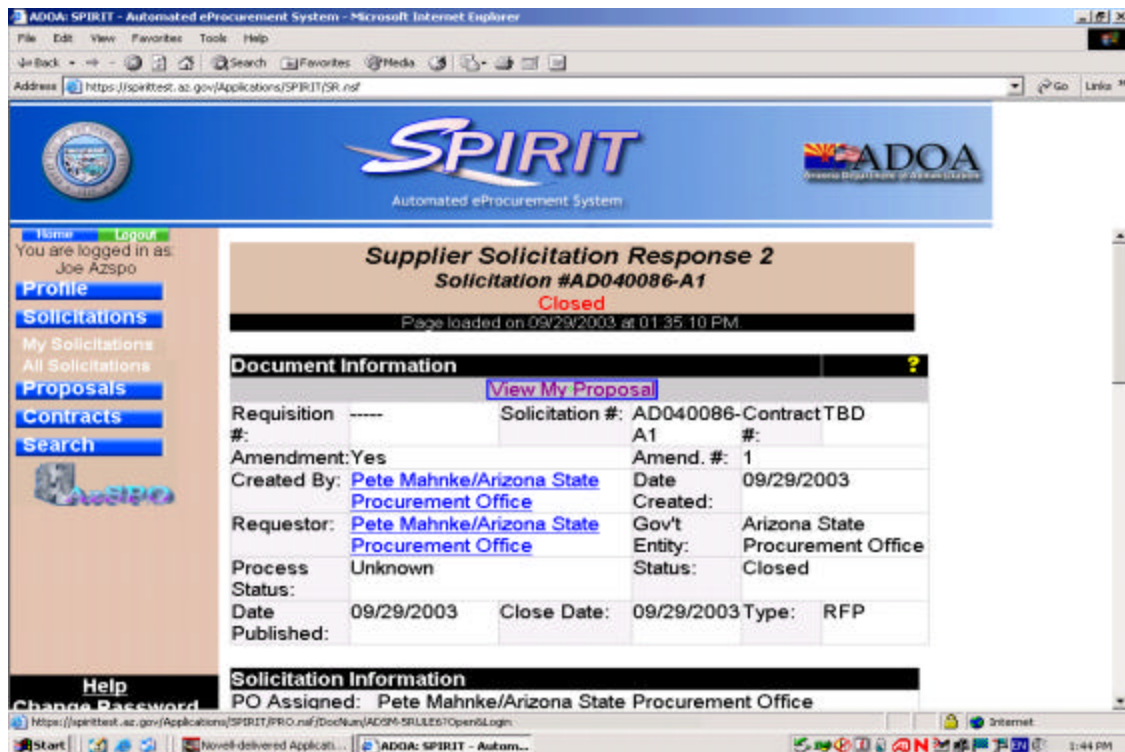
The solicitation opens. Click on the **View My Proposal** link. Once at your proposal scroll down to the "To Do List."

Note that Navigation used to arrive at your proposal is not the sole means of routed to it. After logging in, you also could have clicked on the "Proposals" tab, then clicked on the "My Proposals" from its sub-menu. You would then have been able to click on your proposal number, then scrolled down to the "To Do List."
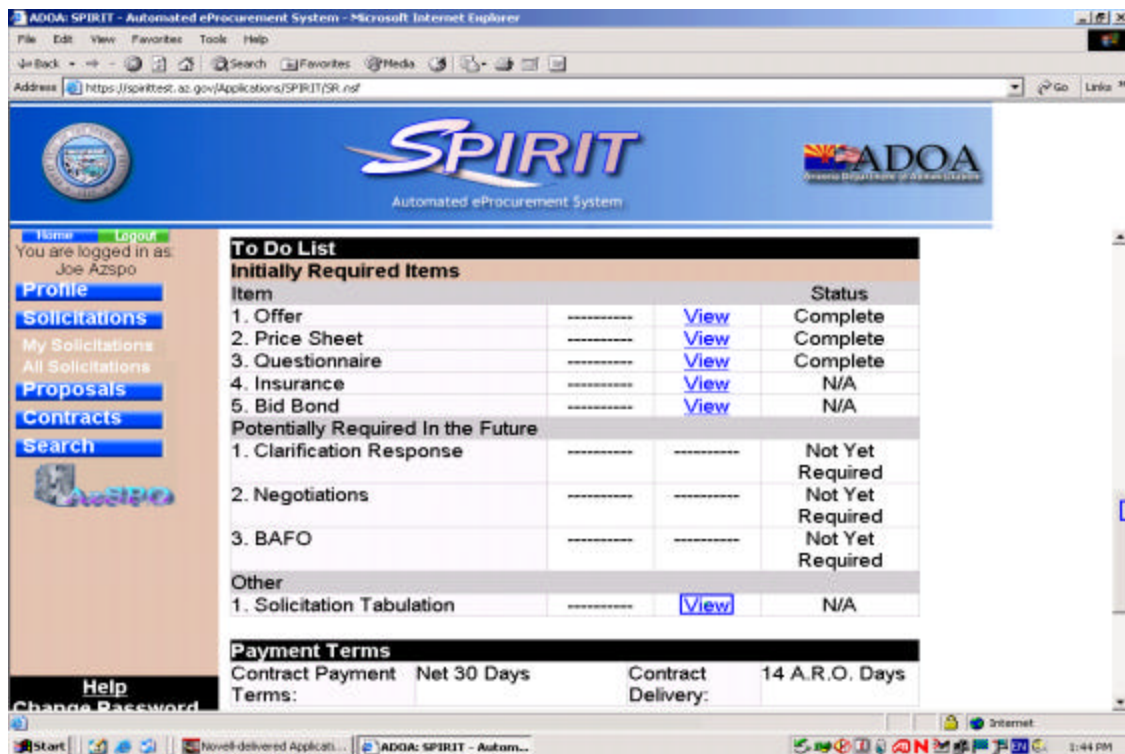
At the "Other" portion within the "To Do List" section click on the "View" link at 1. Solicitation Tabulation.

The Solicitation Tabulation opens you that you may view who has responded to the solicitation.

SPIRIT: Tabulation
AD040048
Page loaded on 10/07/2003 at 08:38:56 AM.

Proposals

AD040048 - Off Contract - Pete - all registered IFB

Supplier	Proposal #	Date Submitted	Cost
Joe Azspo Test	ADSM-5Q6N7E	08/06/2003	$ 11,000.00
Grants Tombs	ADSM-5Q6N8R	08/06/2003	$ 10,500.00
Again	ADSM-5Q6N9T	08/06/2003	$ 13,210.00

A Tabulation for an Invitation For Bid or IFB would look something like the image above; total price or cost would be listed along with the supplier bidding.

Proposal Clarification Request

**During the Evaluation process, you may be notified of a "Clarification Request."
It may be that something is missing from your proposal that would clarify a
piece of it or that something in your proposal is not quite clear to the Evaluation
Committee.**
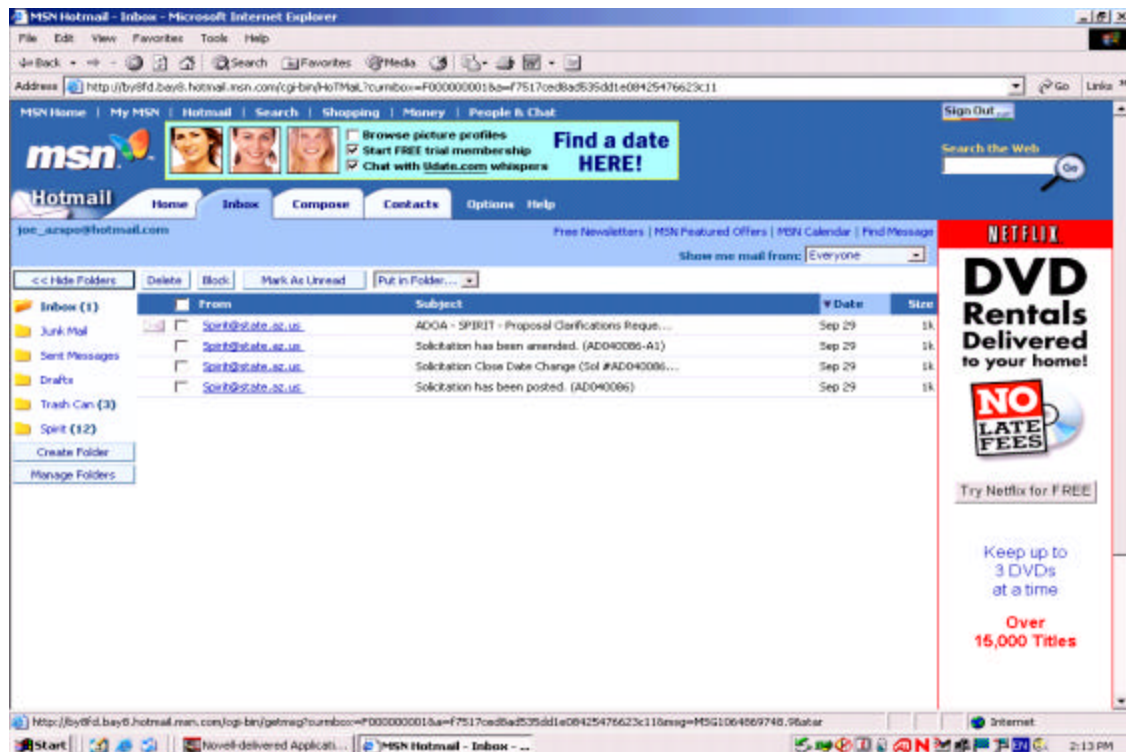
**The supplier has received an e-mail notification from Spirit informing them that
a "Clarification Request" response is available for completion.**

**Their proposal is in evaluation and portions of the proposal are not clear. The
PO has created this request to clarify these issues.**

The supplier clicks on the e-mail link <u>Spirit@state.az.us</u> **to view it.**
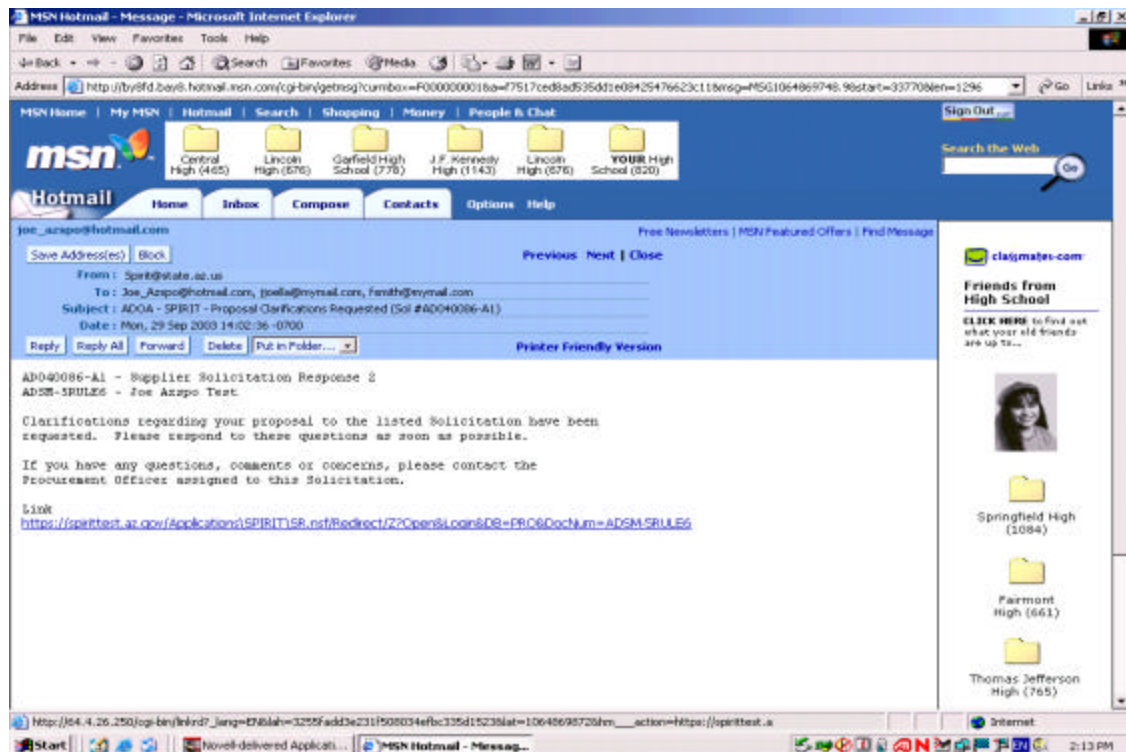
The body of the e-mail includes a brief description of what is being requested. Again, the supplier will use the link to be routed directly to that document in their proposal.

As noted previously; if using a free public e-mail service, it may be necessary to copy the link to Spirit within the e-mail and paste it in a separate browser window.

Log into Spirit using your e-mail address and password.

(To Do List) Potentially Required in the Future

To Do List			
Initially Required Items			
Item			Status
1. Offer	----------	View	Complete
2. Price Sheet	----------	View	Complete
3. Questionnaire	----------	View	Complete
4. Insurance	----------	View	N/A
5. Bid Bond	----------	View	N/A
Potentially Required In the Future			
1. Clarification Response	----------	View	Pending Completion
2. Negotiations	----------	----------	Not Yet Required
3. BAFO	----------	----------	Not Yet Required
Other			
1. Solicitation Tabulation	----------	View	N/A

Once back in the proposal to the solicitation, the supplier scrolls down to the "Potentially Required in the Future" portion of the "To Do List."

This area is now active. 1. Clarification Response now has a View link and a status of Pending Completion

Click on the "View" link to complete the "Clarification Response."

Clarification Response
Proposal # ADSM-5RULE6
Solicitation # AD040086-A1
Page loaded on 09/29/2003 at 02:06:42 PM.

= *Required Field*

Proposal Information

Proposal #:	ADSM-5RULE6	Solicitation #:	AD040086-A1
Date Created:	09/29/2003	Date Submitted:	

Clarification Questions

Instructions

During the evaluation of your proposal to solicitation AD040086-A1 "Supplier Solicitation Response 2" we were unable to discern what was meant by ...

Questions

1. Could you please clarify what the intent of your method of approach statement on page 12, paragraph 2?

2. It appears that the Stammer I is equal to the Stammer II, is this the case or are we missing something somewhere?

Attachments　　　　　　　　　　?

Add　　Remove

None

Save as: ⦿ Draft ○ Complete

Submit　Cancel　Reset

The "Clarification Response" opens.

> 1. Could you please clarify what the intent of your method of approach
> statement on page 12, paragraph 2?
>
> Type or paste answer in here

The supplier can type in the appropriate answers or copy and paste the answers from a document outside Spirit if someone else in his/her company addressed the questions.

Note: if copying and pasting from another document, it is usually best to save the document of origin as a "Text" document. Sometimes, code within a word processor file does not translate correctly. Example: Quotation marks may appear as Question marks after being pasted into Spirit.

Attachments - Clarification Response

The "Clarification Response" allows for the attachments of documents if the supplier feels that in addition to the answers typed in, that other documentation may be necessary to fully clarify the issues.

Attachments   **?**

| Add | Remove |

None

Save as: ⊙ Draft ○ Complete

Submit   Cancel   Reset

At the bottom of the screen is the Attachment section. It functions in the same manner as Attachment sections discussed previously, which is not unlike

attaching documents to an e-mail. Click on the Add **button to attach a file(s).**

Click on the **button to locate the file(s) you wish to attach.**

Once you have located the file (in this suppliers instance it is the **file), double click on the file name or click on the Open button. You will then again see a screen similar to the one above, with the exception being that the file name will appear in the field underneath "Select & Upload a File." At this point you would click on the** **button to attach the file to your Clarification Response.**

The attached file now appears in the Attachments section and is a link that can be clicked on to be viewed.

Attachments Removal - Clarification
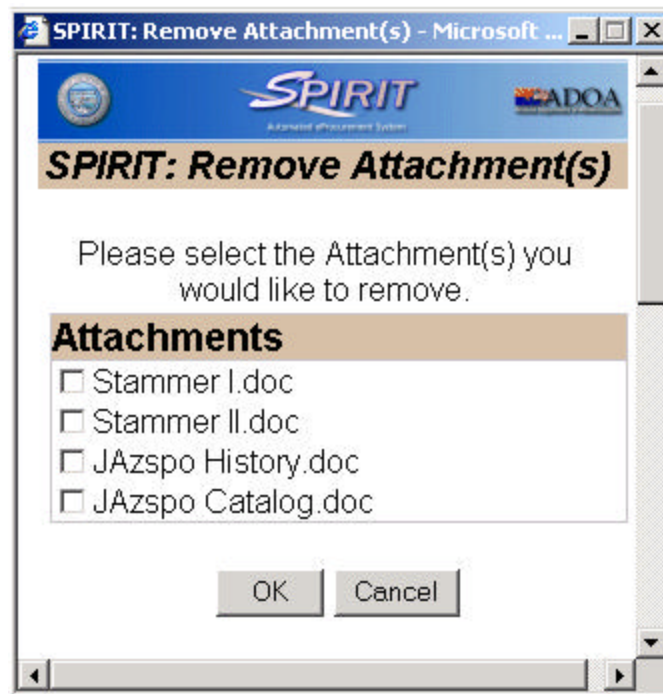
To remove any attached files, click on the Remove **button. The window above will open listing the files attached. Place a checkmark in the box(es) to the left of the file(s) you wish to remove. Then click on the** OK **button.**

Save as:

If the supplier is finished with the Questionnaire and wants to route it back to the PO, he would change the status to "Complete" and click on the Submit **button (as in the image above).**

If not, the supplier can leave the status as "Draft," click on the "Submit" button to be "Submitted" as "Complete" at a later time.

To Do List			
Initially Required Items			
Item			Status
1. Offer	----------	View	Complete
2. Price Sheet	----------	View	Complete
3. Questionnaire	----------	View	Complete
4. Insurance	----------	View	N/A
5. Bid Bond	----------	View	N/A
Potentially Required In the Future			
1. Clarification Response	----------	View	Complete
2. Negotiations	----------	----------	Not Yet Required
3. BAFO	----------	----------	Not Yet Required

Once you have submitted the Clarification Response you will be back at the proposal. Scroll down to the To Do List. The status of the Clarification Response is now "Complete."

Negotiation Response

Another step in the procurement process that may arise is the "Negotiation" piece.

Spirit sends out an e-mail notification as it has for the previous subjects covered. The supplier then responds to the Negotiation Request with a Negotiation Response within the Spirit System.

Rather than begin at the Notification point, we will respond to the "Negotiation Request" by using the navigation menu in Spirit.

Click on the "Proposals" tab.

Once logged in click on the Proposals **tab from the main menu. Then click on the** My Proposals **from the sub-menu.**

The supplier is routed to the "My Proposals By Solicitation Number" area within Spirit and locates his proposal from the list.

Click on the "Proposal Number Link" ADSM-5RULE6

To Do List				
Initially Required Items				
Item				Status
1. Offer	----------	View		Complete
2. Price Sheet	----------	View		Complete
3. Questionnaire	----------	View		Complete
4. Insurance	----------	View		N/A
5. Bid Bond	----------	View		N/A
Potentially Required In the Future				
1. Clarification Response	----------	View		Complete
2. Negotiations	----------	View		Pending Completion
3. BAFO	----------	----------		Not Yet Required
Other				
1. Solicitation Tabulation	----------	View		N/A

Once in the proposal, scroll down to the "Potentially Required in the Future" portion of the "To Do List" section.

To complete the "Negotiations" form, click on the View link.

Note that the status is "Pending Completion."

Proposal Negotiation Reponses
By Request Number
Page loaded on 09/30/2003 at 01:23:26 PM.

[   ] Search

Date Requested	Neg Res #	Status	Requestor
09/30/2003 01:21:25 PM	ADSM-5RVRVE	Draft	Pete Mahnke/Arizona State Procurement Office

<Previous Documents   Next Documents>

The "Proposal Negotiation Responses By Request Number" page opens. The link for this document is the date and time the request was submitted by the PO. Click on the link 09/30/2003 01:21:25 PM

Note that the status is "Draft." Spirit has generated a questionnaire type form for you. As you have not completed it yet, it is in "Draft" status.

Negotiation Response
Proposal # ADSM-5RULE6
Solicitation # AD040086-A1
Page loaded on 09/30/2003 at 01:23:28 PM.

Negotiation Questions

Instructions

The evaluation committee for your proposal to solicitation number
AD040086-A1 would like to run through a number of possible negotiation
points...

Questions

1. With regard to your methodology for...

2. If the State of Arizona were to...

The "Negotiation Response" form created for you opens in read mode.

Click on the "edit" [icon] icon to complete it.

Negotiation Response
Proposal # ADSM-5RULE6
Solicitation # AD040086-A1
Page loaded on 09/30/2003 at 01:23:33 PM.

● = Required Field

Negotiation Questions

Instructions

The evaluation committee for your proposal to solicitation number
AD040086-A1 would like to run through a number of possible negotiation
points...

Questions

1. With regard to your methodology for...

2. If the State of Arizona were to...

Save as: ● Draft ○ Complete

The questionnaire includes instructions for completion as written by the PO.
Type in the answers you feel appropriate in this negotiation stage of the
process.

Negotiation Questions   **?**

Instructions

The evaluation committee for your proposal to solicitation number AD040086-A1 would like to run through a number of possible negotiation points...

Questions

1. With regard to your methodology for...

```
Our usual methodology for...
```

2. If the State of Arizona were to...

```
We would welcome...
```

Save as: ○ Draft ⊙ Complete

[Submit] [Cancel] [Reset]

If the supplier is satisfied with the work, they may change the status to "Complete" and click on the [Submit] **button so that the evaluation process can continue.**

Once you have submitted the "Negotiation Response" as "Complete" you will be returned to your proposal. You may scroll down to the "To Do List", the status for the "Negotiations" is now "Complete."

Supplier Meeting Request

During the evaluation process of a solicitation, the PO and Evaluation Committee may decide it is necessary to meet with a particular supplier(s) regarding their proposal to the solicitation. This meeting may be called to discuss individual portions of the proposal or for demonstrations, etc.

When and if this becomes necessary, the PO will create a Supplier Meeting Request in the Spirit System. When published, Spirit will generate an e-mail to be sent to the supplier(s). The supplier(s) will not need to do anything within the Spirit System, as this is just an e-mail message.
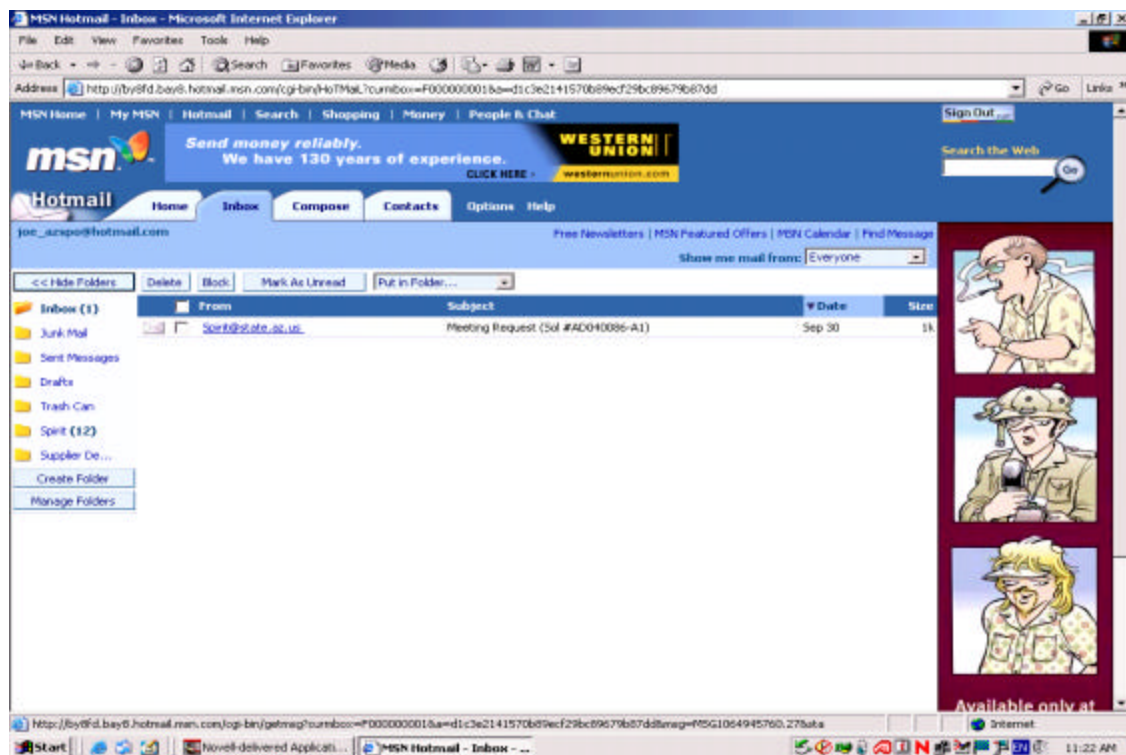
Spirit@state.az.us
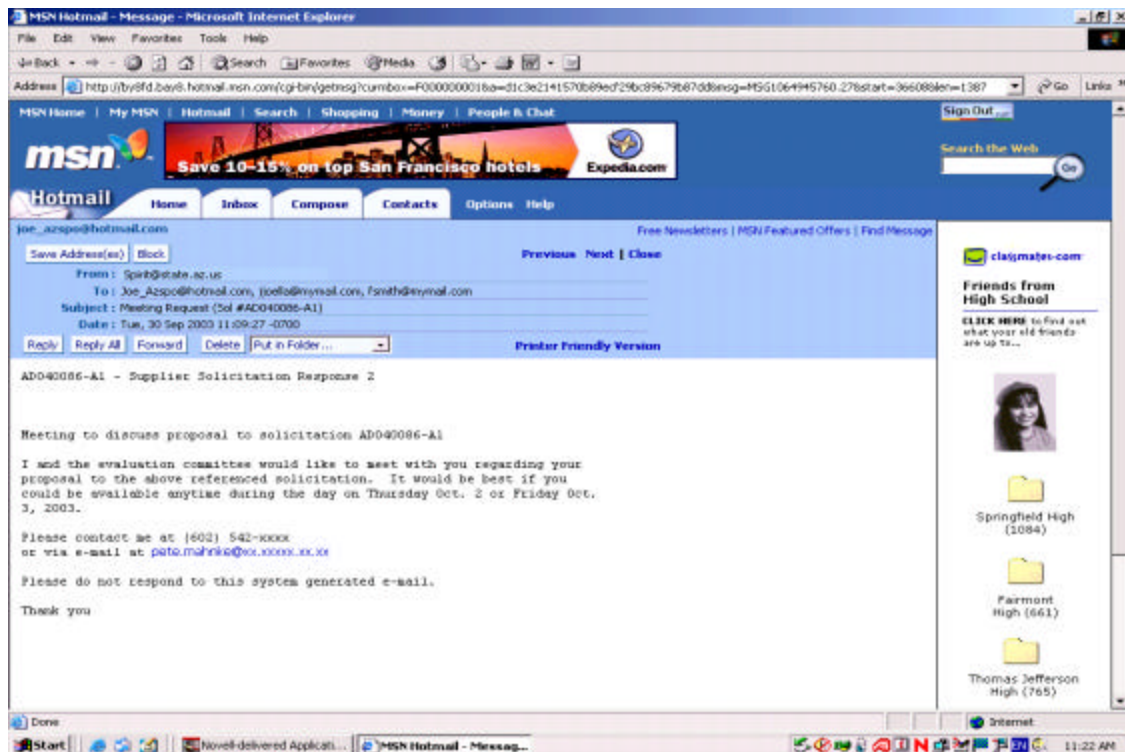
As stated in the introduction to the Supplier Meeting Request, this message is an e-mail notification generated by the Spirit System containing the information the PO typed into the "Supplier Meeting Request" appropriate to this supplier.

Again, this notification, once published is not respond able to within the Spirit System

Best and Final Offer

This next possible step in the procurement process is the Best and Final Offer or BAFO. Spirit does send an e-mail notification for this step as well, but the demo will begin within the suppliers proposal. If we had started at the notification for this step, following the link and logging in would have routed you directly to the BAFO Questionnaire.

The procurement code allows for the PO to, if deemed necessary, to take the RFP to this next step. All proposals have been evaluated by the evaluation committee, yet, they hope to improve upon the original offer in the proposal(s). Suppliers that are found to be reasonably susceptible of award should receive BAFO Requests, if the PO deems a BAFO round necessary.

Spirit generates a duplicate of you the solicitation and your proposal submitted, thereby allowing you to edit and/or change anything in your original proposal.

As with the solicitation amendment, you will have to complete the "Offer" form.

Click on the View **link for 3. BAFO.**

The "BAFO Request" questionnaire opens. It includes Instructions, which could be considered the BAFO letter if you are familiar with this process. It also includes questions or areas that the evaluation committee and PO would like you to address.

To submit a BAFO Proposal, click on the [Submit BAFO Proposal] link. Spirit will now generate the duplicate proposal referred to moments ago.

Once this is done, the older version of your proposal will be closed and the BAFO Proposal version will encompass it.

A "Processing Please Wait" screen will be next up as Spirit generates your proposal. To repeat; all info and pricing offered in your original proposal will be included in the BAFO proposal draft.

A BAFO draft has been generated for you. Note that in the "Proposal Information" section that your proposal number now has a suffix of -1; this is your new proposal. Is BAFO? indicates "Yes" and BAFO#: is 1.

(Note: Price Sheet) Your "Total Price" is back to zero; however, you do not have to redo the Price Sheet. All the pricing and information you entered previously is still in there, however, you may make changes if you wish. If you do not make changes to the Price Sheet, you need not even address it. Like the amendment, the BAFO Price Sheet has only one status and that is "Complete," but it is editable.

The Questionnaire is in the same state as the Price Sheet.

Once in the BAFO proposal draft, scroll down to the "To Do List."

To Do List			
Initially Required Items			
Item			Status
A. Previous Proposal	----------	View	N/A
● B. BAFO Questionnaire	----------	View	Pending
● 1. Offer	Create	----------	Pending
● 2. Price Sheet	----------	View	Complete
● 3. Questionnaire	----------	View	Complete
● 4. Insurance	----------	View	N/A
● 5. Bid Bond	----------	View	N/A
Potentially Required In the Future			
1. Clarification Response	----------	----------	Not Yet Required
2. Negotiations	----------	----------	Not Yet Required
3. BAFO	----------	----------	Not Yet Required
Other			
1. Solicitation Tabulation	----------	View	N/A

The "To Do List" now has two additional links:

A. Previous Proposal**, which allows you to link back to your original for reference.**

● B. BAFO Questionnaire**, which must be completed with your BAFO Response.**

Note the "Potentially Required in the Future" area. None of those steps is required yet, as this is in essence a new proposal. It is possible that these areas may be addressed down the road, but only if deemed necessary by the PO.

Click on the View **link to complete** ● B. BAFO Questionnaire

The BAFO Questionnaire you viewed previously is now available in an editable mode. This questionnaire can be saved as "Draft" and returned to at a later time, if the supplier wishes.

Type in the appropriate answers and submit the document as either "Draft" or "Complete." The demo will "Submit" as "Complete" once the answers have been typed in.

If necessary you may attach additional documents to your "BAFO Proposal" prior to submitting it as "Complete. But , these attachments must be addressed in the Attachments section at the main BAFO proposal screen.

At the bottom of the BAFO Questionnaire screen is the Save as: area. If you are satisfied that the Questionnaire is done, change the status to Complete and click on the [Submit] **button. Otherwise you may keep it as draft and return later to change its status.**

Once submitted you will be returned to the main BAFO proposal draft. Scroll down to the To Do List

To Do List			
Initially Required Items			
Item			Status
A. Previous Proposal	----------	View	N/A
● B. BAFO Questionnaire	----------	View	Complete
● 1. Offer	Create	----------	Pending
● 2. Price Sheet	----------	View	Complete
● 3. Questionnaire	----------	View	Complete
● 4. Insurance	----------	View	N/A
● 5. Bid Bond	----------	View	N/A
Potentially Required In the Future			
1. Clarification Response	----------	----------	Not Yet Required
2. Negotiations	----------	----------	Not Yet Required
3. BAFO	----------	----------	Not Yet Required
Other			
1. Solicitation Tabulation	----------	View	N/A

Note that the status of the BAFO Questionnaire is Complete.

Click on the Create link to fill out and complete the Offer and Acceptance form. Remember, this is the same form you filled out in the original proposal and amendment, if one was issued.

The Offer and Acceptance will open. Fill out the Clarification Information section. Be sure to select whether your company is a small business or not.

Then click on the Accept **button.**

To Do List				
Initially Required Items				
Item				Status
A. Previous Proposal	----------	View		N/A
● B. BAFO Questionnaire	----------	View		Complete
● 1. Offer	----------	View		Complete
● 2. Price Sheet	----------	View		Complete
● 3. Questionnaire	----------	View		Complete
● 4. Insurance	----------	View		N/A
● 5. Bid Bond	----------	View		N/A
Potentially Required In the Future				
1. Clarification Response	----------	----------		Not Yet Required
2. Negotiations	----------	----------		Not Yet Required
3. BAFO	----------	----------		Not Yet Required
Other				
1. Solicitation Tabulation	----------	View		N/A

Once again, you will be returned to the BAFO proposal.

The supplier in the demo (this material was exported from it), indicated in the BAFO Questionnaire that the price was lower on the Line Item 1. Let's assume this is the case with your BAFO proposal and address the Price Sheet.

Click on the View link at ● 2. Price Sheet to make the change.

The Proposal Price Sheet will open. Click on a Line Item number link. This manual will make a change to Line Item 1 as indicated above.

The image above is only a portion of the Proposal Line Item. Note that each field is now in an "edit" mode.

Once you have made any changes you must click on the ⟨Submit⟩ button to save the change. Once back at the Proposal Price Sheet click on the ⟨Close⟩ button or make changes to other line items.

NOTE the "Save as:" status in the image above. As mentioned previously; had you not made any changes to pricing you could have ignored the Price Sheet entirely. With the original proposal to the solicitation you had a "Draft" option as well. In the BAFO Proposal there is only one status, so that if no changes are made, you do not need to address the status of any line items.

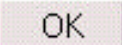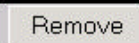| To Do List			
Initially Required Items			
Item			Status
A. Previous Proposal	----------	View	N/A
● B. BAFO Questionnaire	----------	View	Complete
● 1. Offer	----------	View	Complete
● 2. Price Sheet	----------	View	Complete
● 3. Questionnaire	----------	View	Complete
● 4. Insurance	----------	View	N/A
● 5. Bid Bond	----------	View	N/A
Potentially Required In the Future			
1. Clarification Response	----------	----------	Not Yet Required
2. Negotiations	----------	----------	Not Yet Required
3. BAFO	----------	----------	Not Yet Required
Other			
1. Solicitation Tabulation	----------	View	N/A

Again, you will be returned to the BAFO Proposal

At the bottom of the screen is the Attachment section. It functions in the same manner as Attachment sections discussed previously, which is not unlike attaching documents to an e-mail. Click on the Add **button to attach a file(s). The above window will open.**

Click on the Browse... **button to locate the file(s) you wish to attach.**

Once you have located the file (in this suppliers instance it is the
Joe BAFO attachment **file), double click on the file name or click on the Open
button. You will then again see a screen similar to the one above, with the
exception being that the file name will appear in the field underneath "Select &**

Upload a File." At this point you would click on the OK **button to attach
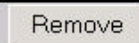the file to your Clarification Response.**

Attachments   **?**

                              Add   Remove

Joe BAFO attachment.doc

Save as: ⦿ Draft ○ Complete ○ Cancel

Submit   Reset

The file appears as a link in the Attachments section.

**NOTE: the files attached to your original proposal are still linked to that
proposal. To view them you need to return to the "To Do List" and click on the
"View" link for A. Previous Proposal.**

Attachments   **?**

                              Add   Remove

Joe BAFO attachment.doc

Save as: ⦿ Draft ⦿ Complete ○ Cancel

Submit   Reset

If complete, change the status to "Complete" and click on the Submit
button.

Your Best and Final Offer is complete.

Had you submitted the BAFO Proposal as "Draft" you could return to this screen to re-access the "Draft."

Supplier Information Request (RFI)
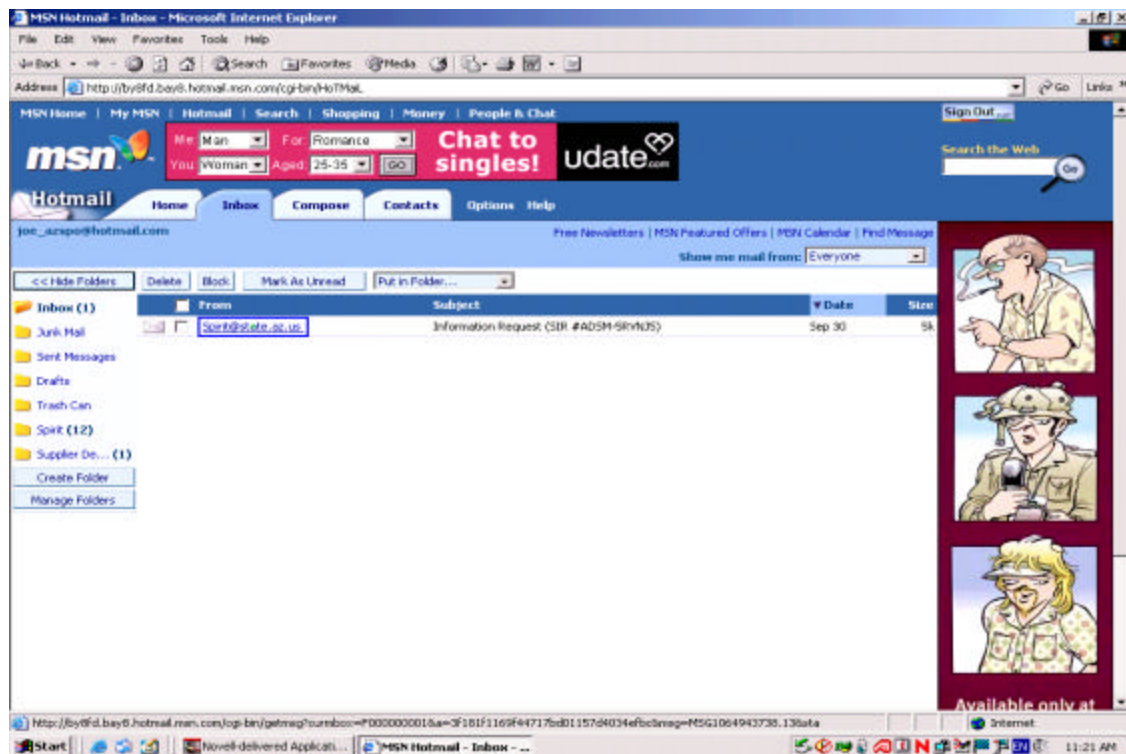
Occasionally you may receive what is referred to as a Supplier Information Request or SIR.

The SIR has replaced the Request For Information or RFI.

It is a simple request the Arizona State Procurement Office may issue when it is trying to get an idea of what might be available or possible in the market.

The SIR, once issued, is addressed outside the Spirit System and would be received by the appropriate supplier community via e-mail.
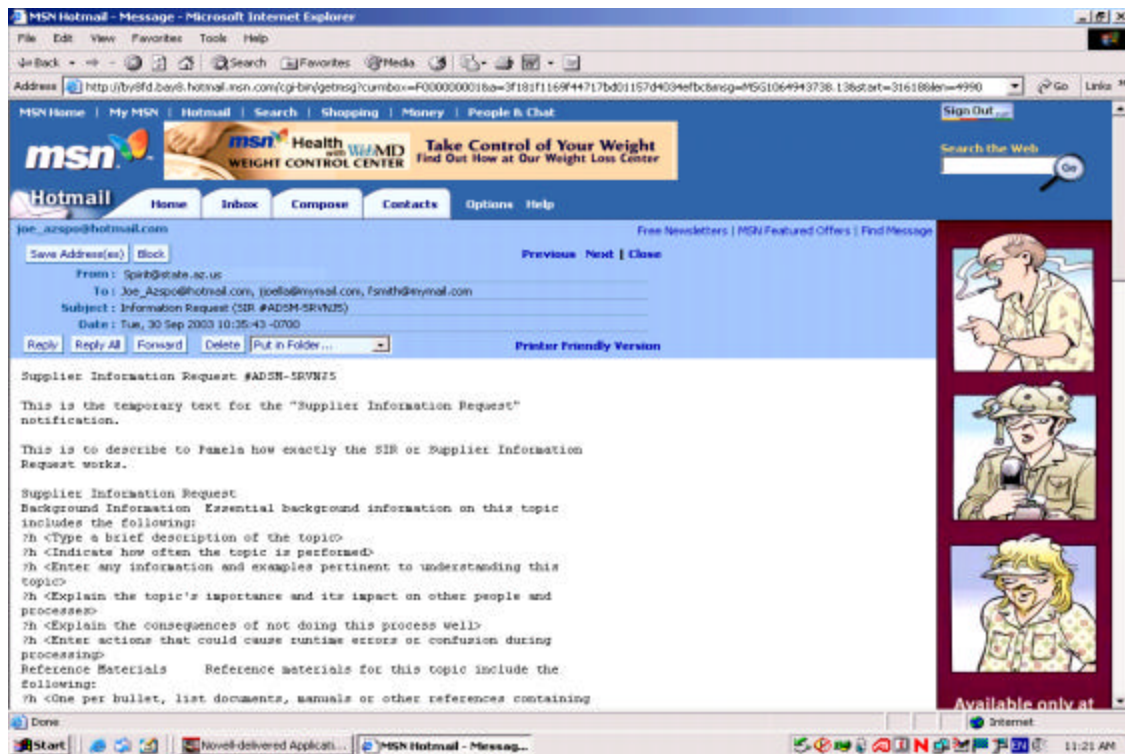
All information requested should be apparent within the e-mail notification. Including how to submit any response.